Permanency Plan

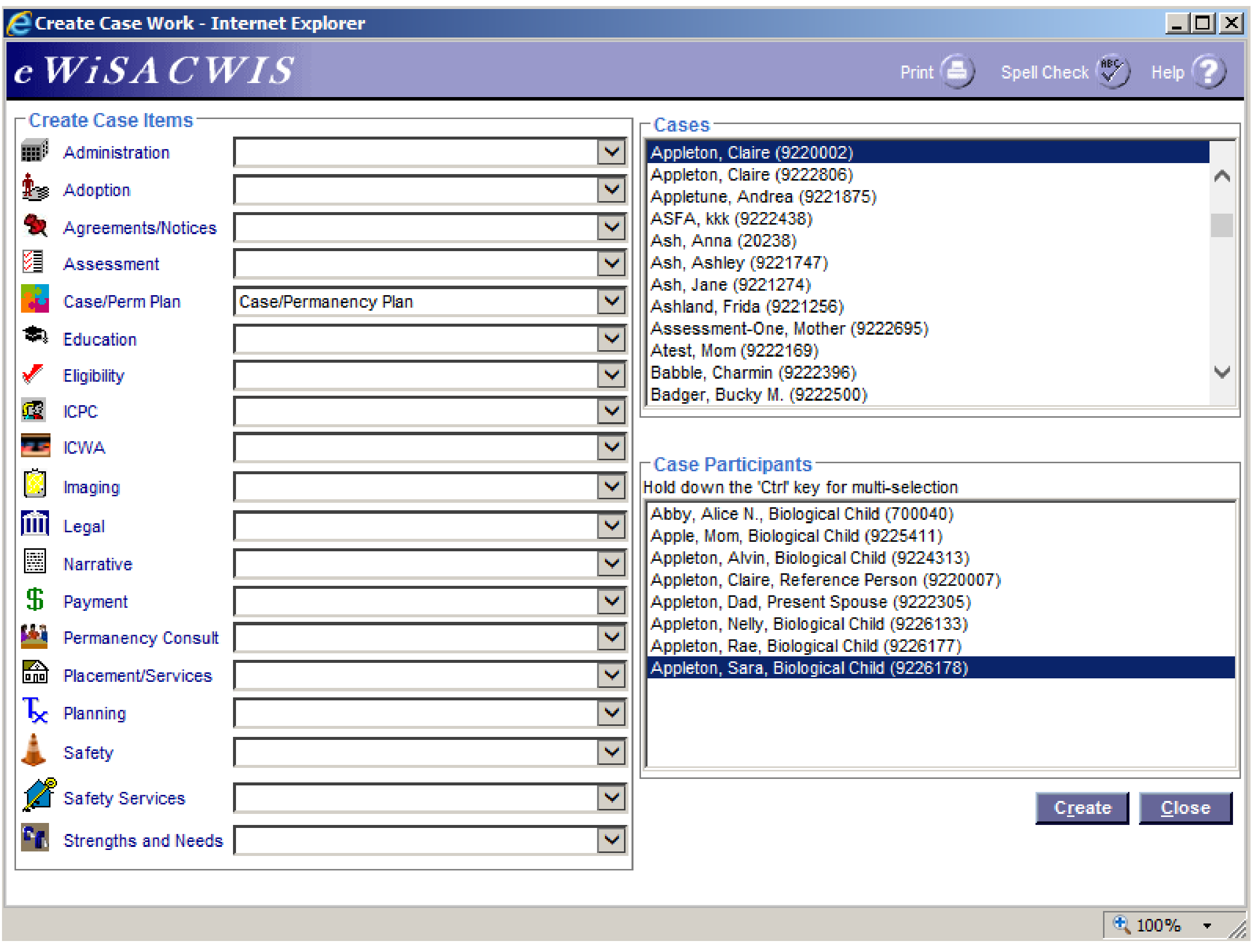
The Permanency Plan has many different aspects and can change when information is updated on the case or person. If the child has an Out of Home Placement (OHP) and there are no safety concerns (the child is safe) on the Safety Assessment, Analysis and Plan, then the Case/Permanency Plan page will not have a Safety tab. For a child in an OHP with a Person Type of CPS then the Safety tab displays. If a Case/Permanency Plan already exists for a child in the case, then you can use the copy function when you create the Permanency Plan.

Note: In order to create a Permanency Plan, an assignment to the case is needed.

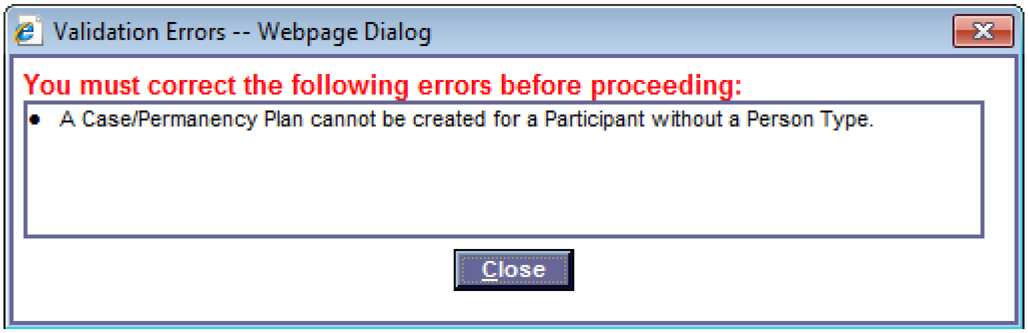
1. From the desktop, go up to Create > Case Work or click the Case Work hot button 

. This will open the Create Case Work page.

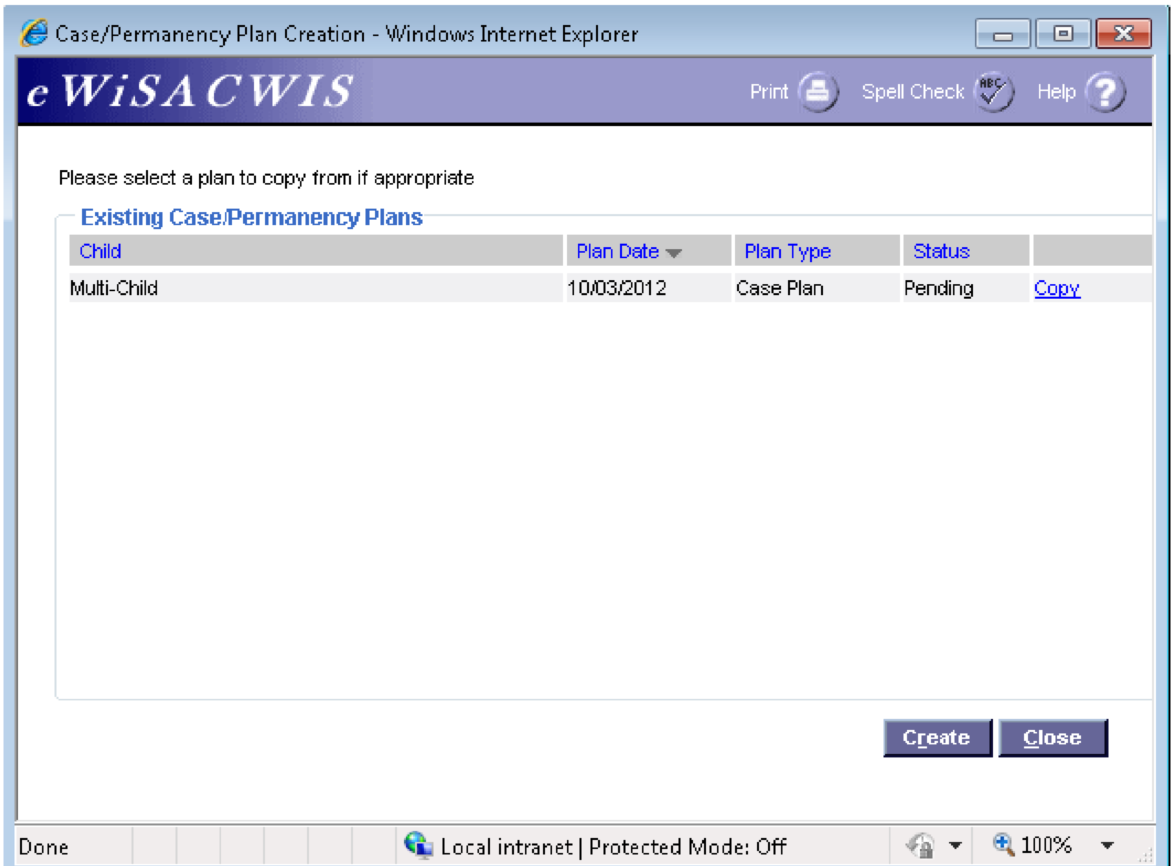
2. On the Create Case Work page, select Case/Permanency Plan from the Case/Perm Plan icon. Select the family and the case participant. Then click Create.



Note: A Person Type is required in order to create a Permanency Plan. See the Person Management User Guide for additional information.



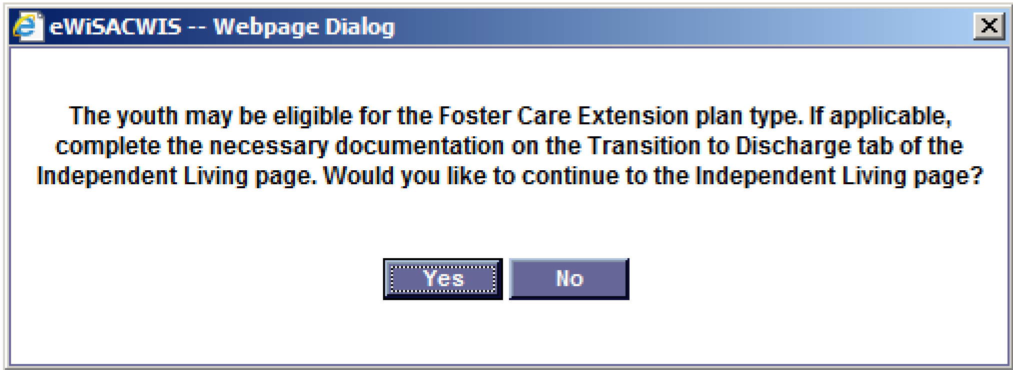
3. If a Permanency Plan or Case Plan exists, the Case/Permanency Plan Creation page will appear. Click the Copy hyperlink to copy an associated Plan. Otherwise, click the Create to create a new Permanency Plan.



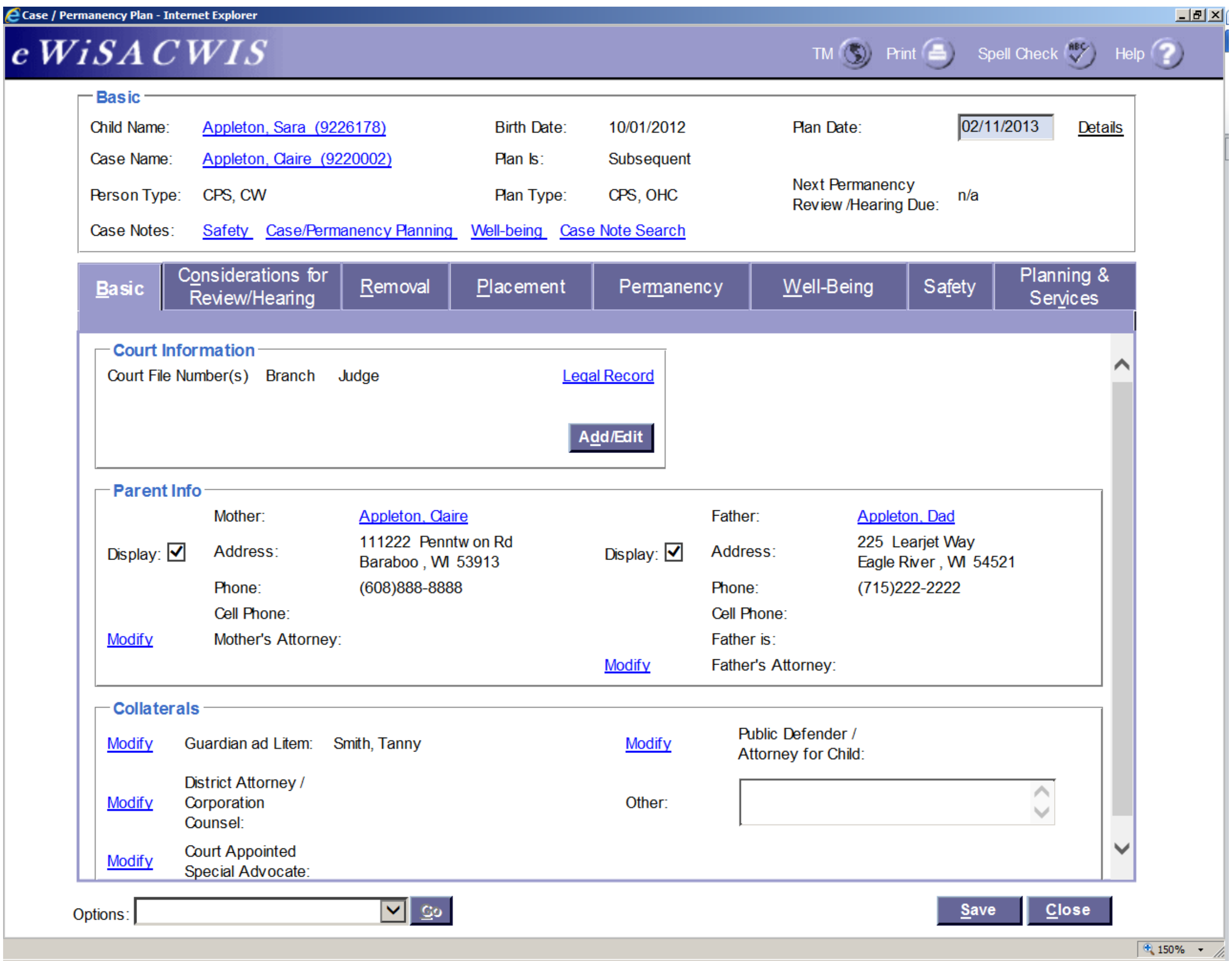
On the Case/Permanency Plan page, a date will prefill in the Plan Date field based on when the next plan is due. The Plan Date will determine what type of plan displays, based on the child's Person Type.

Note: Having a future date on the plan brings in any additional applicable information (Services; Education; Medical/Mental Health; Safety Assessment, Analysis and Plan; and CANS) each time the plan is opened. In order to approve the plan, a future Plan Date is not allowed but upon approval, you will be able to update the Plan Date to the approval date.

Note: If the child is over 18 and extending foster care to 21 face to face contact dates related to the parents, as well as the parent/caregiver and family sections will not appear and Plan Type will show EXT. When attempting to create a plan for a child who may be eligible for the extension users will receive the message below. Clicking "Yes" will take the worker to the Independent Living record in order to complete the extension eligibility. (See the Independent Living Guide for more details)



4. The first tab is the Basic tab. In the Court Information group box, click the Add/Edit button to add the court information.



Note: Select the "Case Notes:" hyperlinks to search Structured Case Notes. See the Creating and Viewing Case Notes/Structured Case Notes User guide for more information.

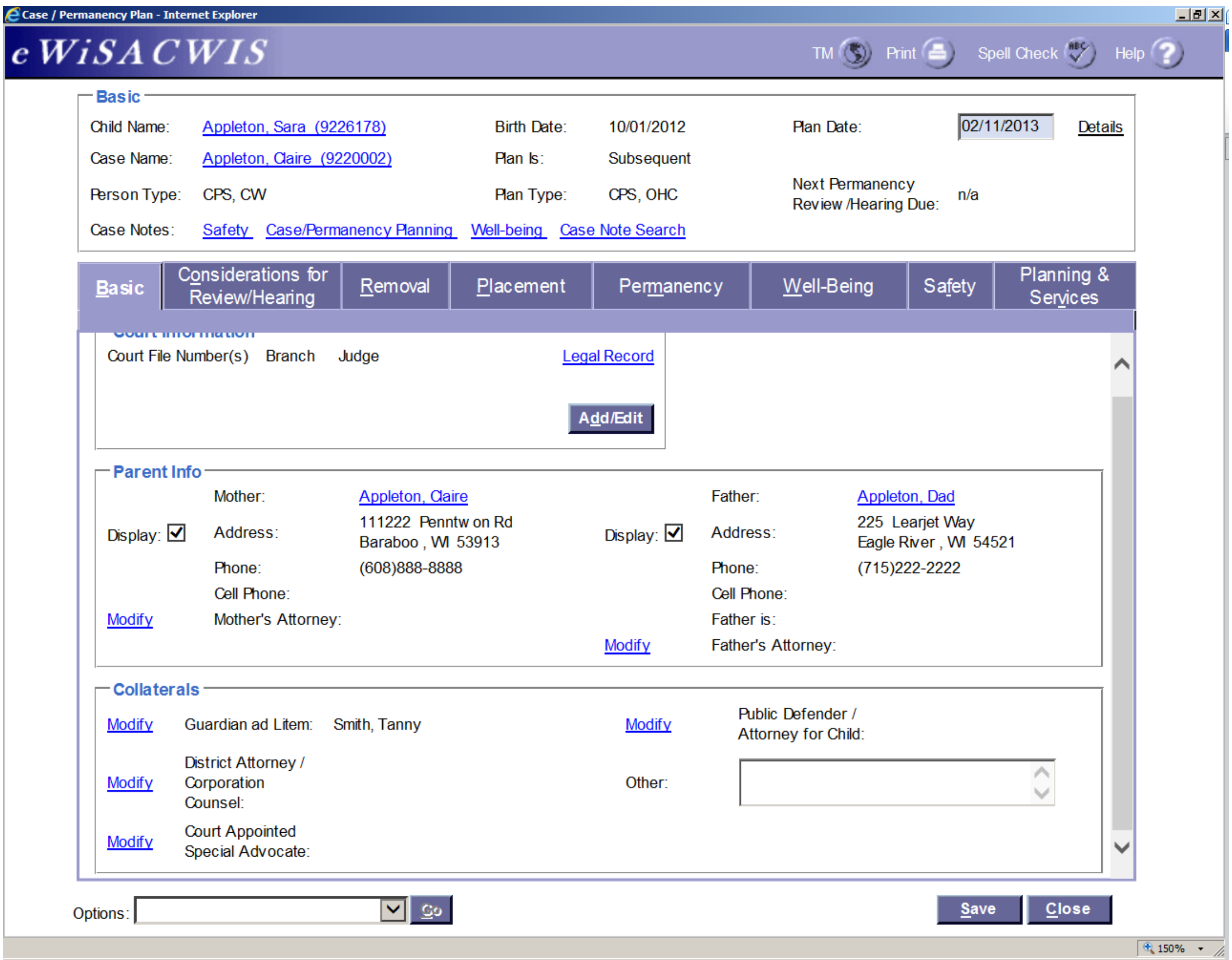
5. On the Court Information Selection page, select all applicable court numbers. If the appropriate court number is not displayed, click the Legal Record hyperlink to add the court information to the Legal Record. Once all court numbers have been selected, click the Continue button to return to the Case/Permanency Plan page.

6. In the Parent Info group box, you will see the child's mother and father. To add either of them, click on the Child Name hyperlink at the top of the page and update the Parent Info tab of the child's Person Management page. If any of the information in the Mother or Father section needs updating, click on the associated Mother or Father hyperlink to open the Mother's or Father's Person Management page. Click on the Modify hyperlink for the mother or father to add the mother's or father's attorney on the Collaterals tab of the Maintain Case page.

   Note: The Display checkbox is automatically checked. If you uncheck the checkbox then the address information does not display on the Permanency Plan template.

   Note: If the child has a Legal Guardian(s) or Indian Custodian(s) documented on the Parent Info tab of her Person Management page, the Legal Guardians and/or Indian Custodians group boxes will appear.

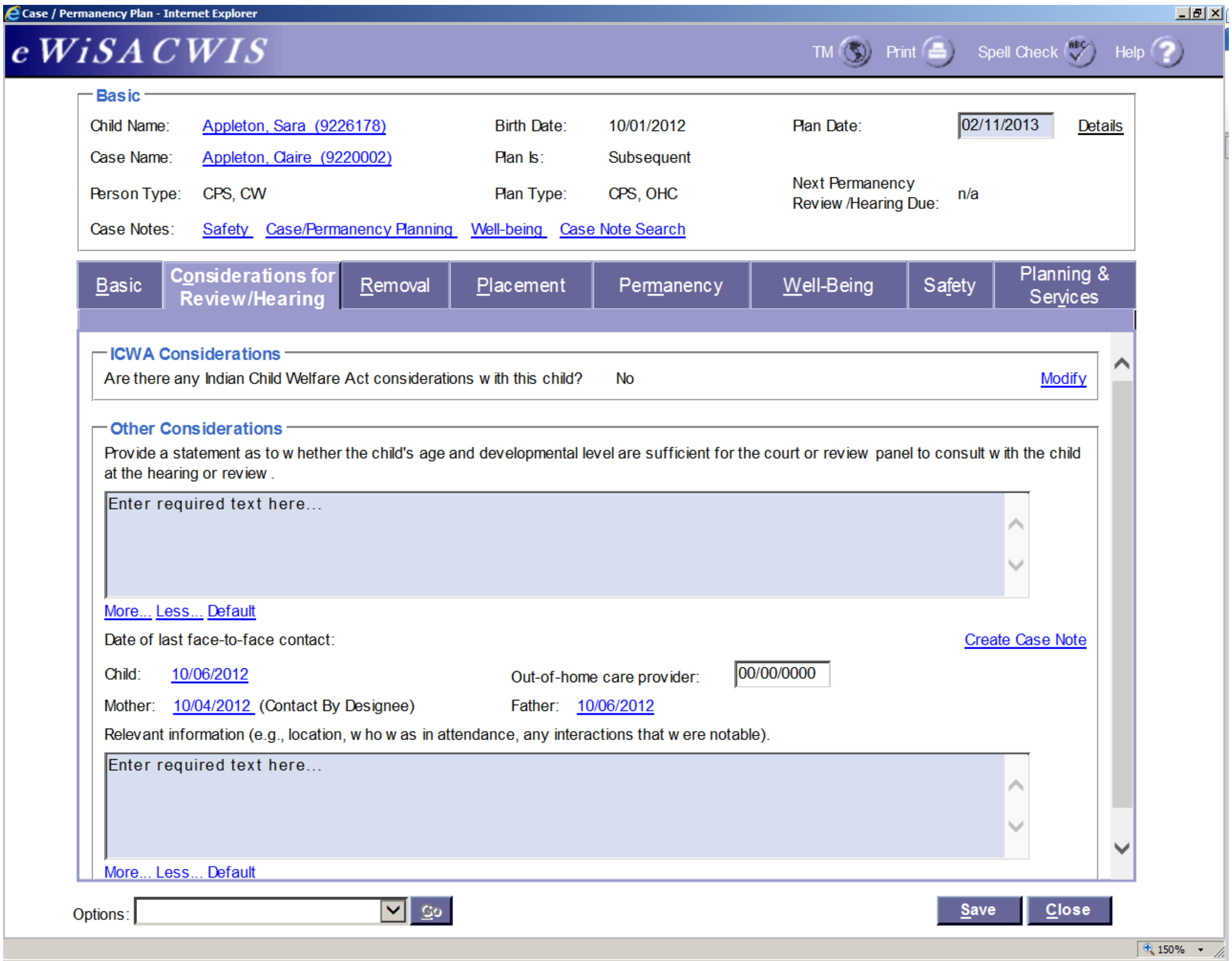
7. To update any of the Collaterals, click on the associated Modify hyperlink in the Collaterals group box. This will open the Collaterals tab on the Maintain Case page. For any other type of collateral besides what is listed in the Collaterals group box, enter information in the Other box.



8. The second tab is the Considerations for Review/Hearing tab. If the ICWA Considerations is Yes then all the pertinent information displays in this group box. Click the Modify hyperlink to update the child's race, ethnicity, and tribal information on the Person Management page.

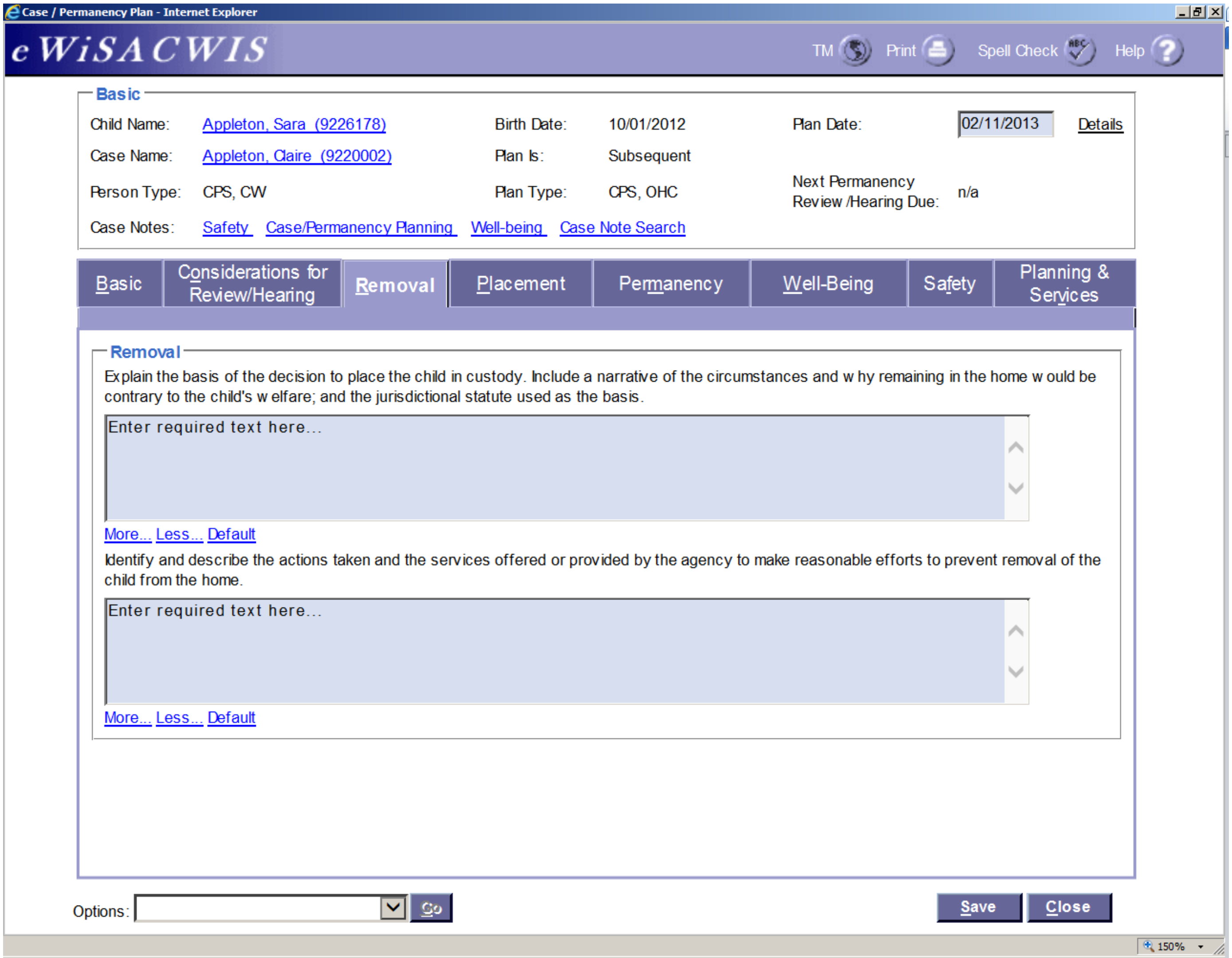
9. Enter text in the narrative boxes in the Other Considerations group box. The Child, Mother, and Father face-to-face contacts will come from the Case Notes page for the most recent face-to-face contacts (Face-to-Face Result must = Occurred). To update the dates, click on the Create Case Note hyperlink to open the Case Notes page. Enter a date for the Out-of-home care provider last face-to-face contact.

   Note: The Finalized checkbox on the Case Notes page does not need to be checked in order for the case notes to appear.



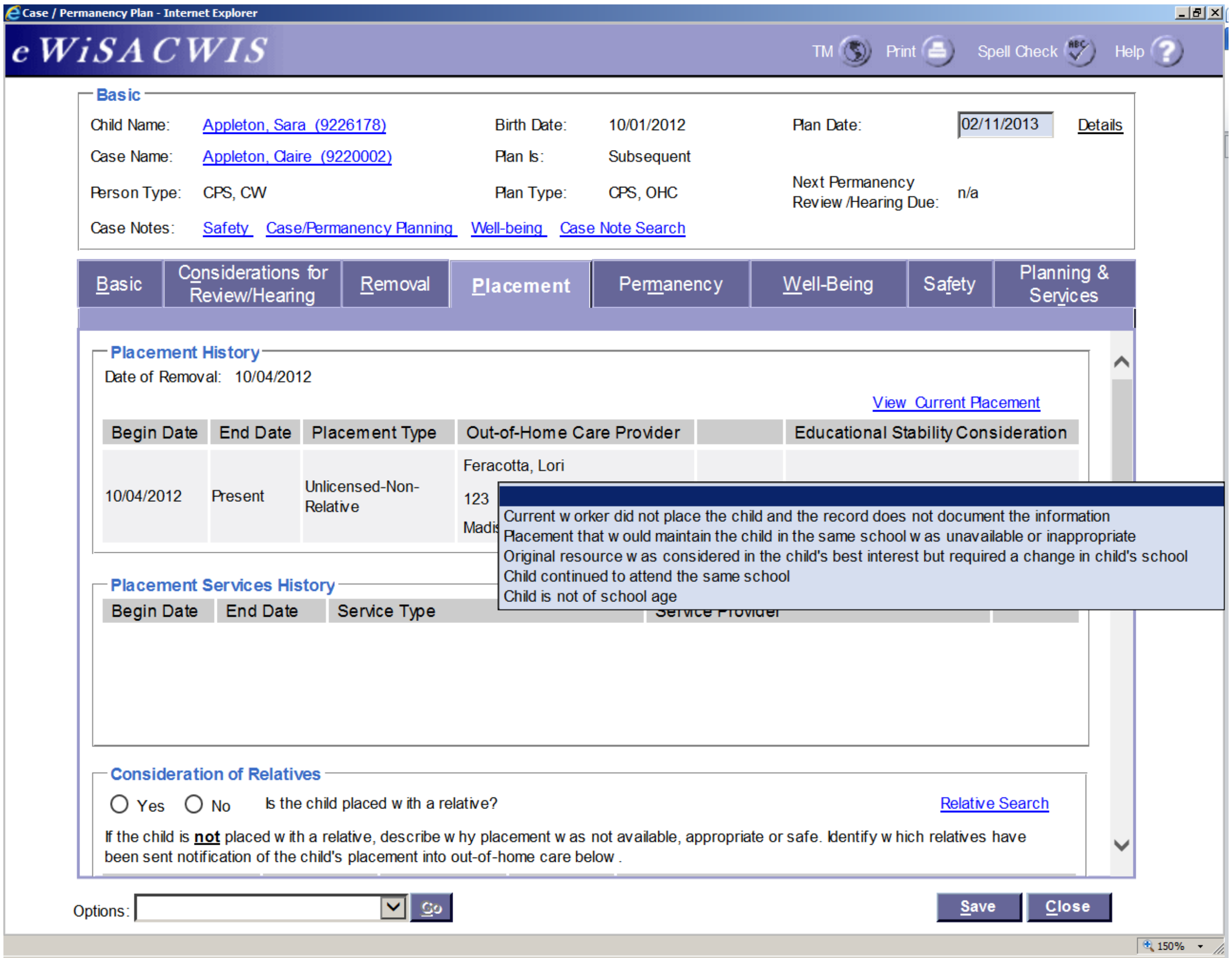
10. The third tab is the Removal tab. Enter text in both of the required narrative boxes in the Removal group box.

Note: If the child is Indian, a third narrative box will appear. Enter narrative in the associated box.



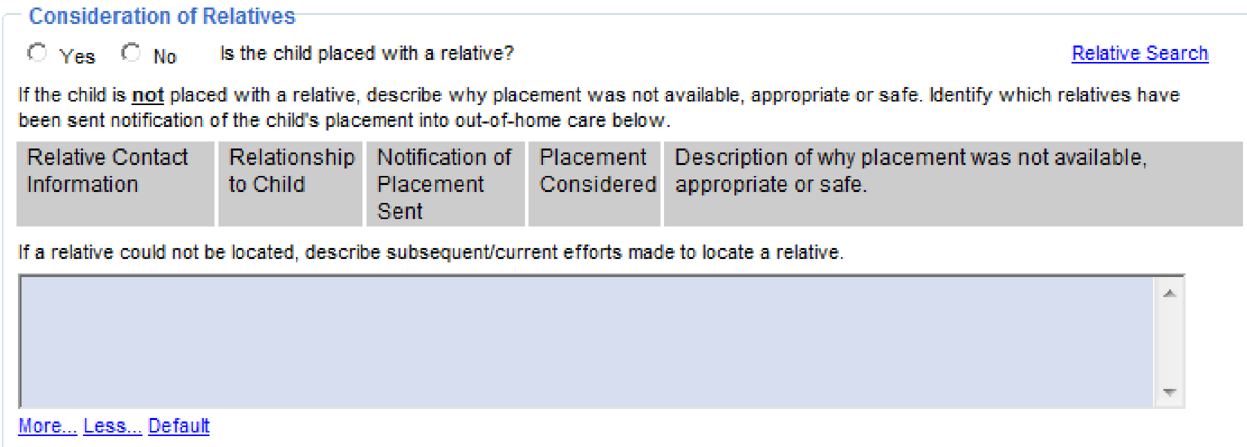
11. The fourth tab is the Placement tab. This displays all information related to the child's placement. If you uncheck the Display checkbox then this information (provider's name and address) does not display on the Permanency Plan template. Select the appropriate Educational Stability Consideration for each Out of Home Placement.

12. If your agency's service types indicate "Prefill Templates," then any applicable Services will pre-fill in the Placement Services History group box.



13. In the Consideration of Relatives group box, select the Yes or No radio button to indicate if the child is placed with a relative.

14. If no relatives are documented on the Relative/Non-Relative Search Summary page for the child, answer the question, “If a relative could not be located, describe subsequent/current efforts made to locate a relative.” To add any relatives, click on the Relative Search hyperlink. See the associated Relative/Non-Relative Search User Guide.



Consideration of Relatives

Yes No Is the child placed with a relative? Relative Search

If the child is **not** placed with a relative, describe why placement was not available, appropriate or safe. Identify which relatives have been sent notification of the child's placement into out-of-home care below.

Relative Contact Information	Relationship to Child	Notification of Placement Sent	Placement Considered	Description of why placement was not available, appropriate or safe.

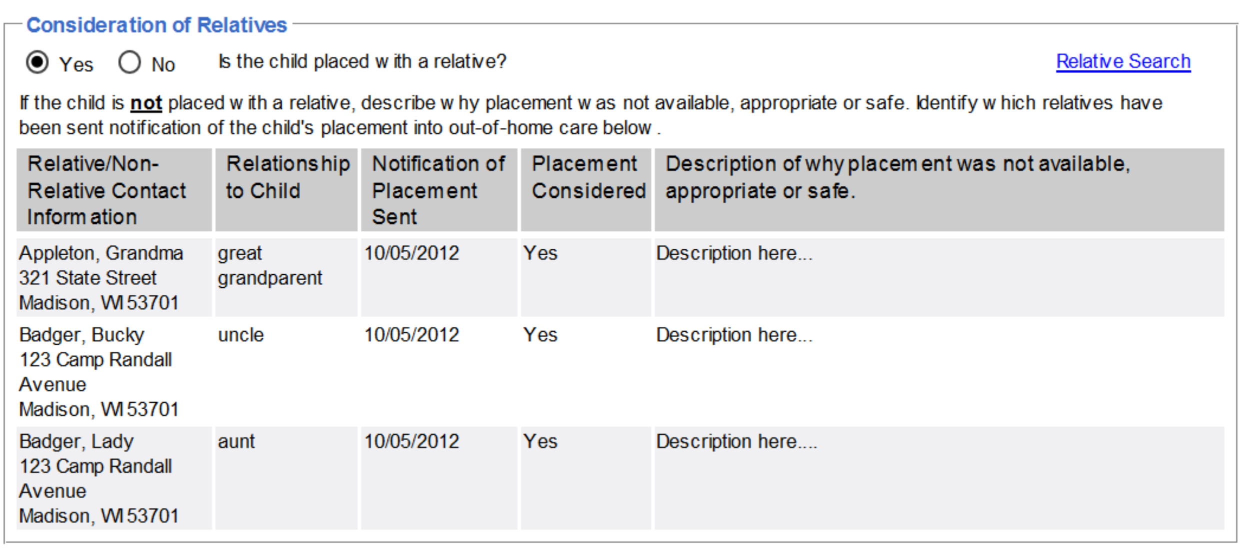
If a relative could not be located, describe subsequent/current efforts made to locate a relative.

More... Less... Default

If the Relative/Non-Relative Search Summary page contains any relatives, the relative section will display the relatives. If indicated ‘Yes’ the child is placed with a relative, at least one relative must be documented on relative search.

Note: Non-Relatives will only display here if a Notification of Placement was sent to that non-relative.

Note: Any Relative Search records that were created when they were copied over from another child when the Notification of Placement was created, will need to have the relationship and placement consideration section completed before the plan can be approved.



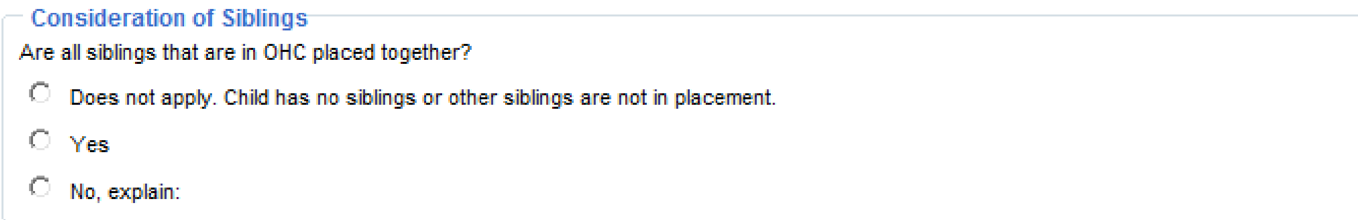
Consideration of Relatives

Yes No Is the child placed with a relative? Relative Search

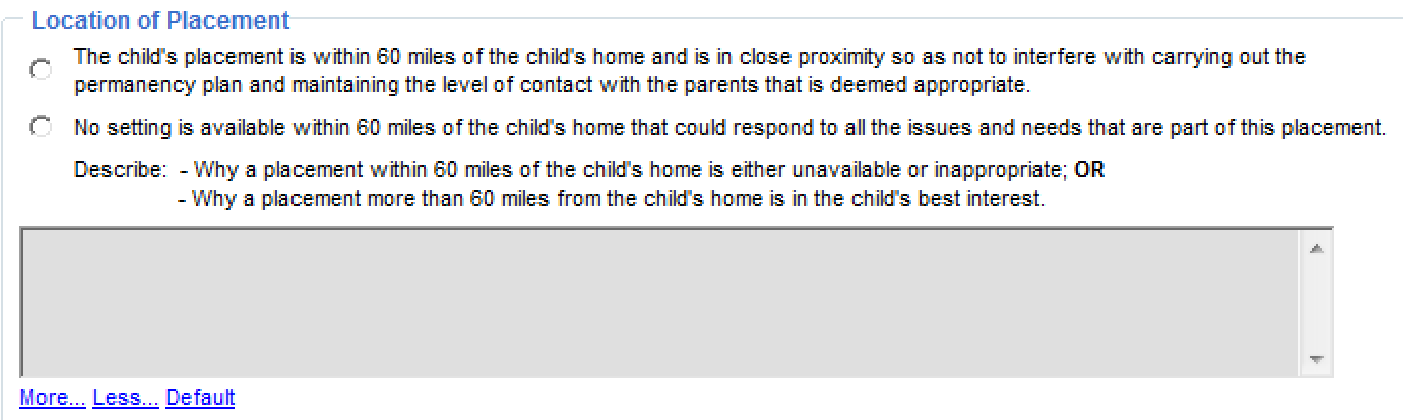
If the child is **not** placed with a relative, describe why placement was not available, appropriate or safe. Identify which relatives have been sent notification of the child's placement into out-of-home care below .

Relative/Non-Relative Contact Information	Relationship to Child	Notification of Placement Sent	Placement Considered	Description of why placement was not available, appropriate or safe.
Appleton, Grandma 321 State Street Madison, WI 53701	great grandparent	10/05/2012	Yes	Description here...
Badger, Bucky 123 Camp Randall Avenue Madison, WI 53701	uncle	10/05/2012	Yes	Description here...
Badger, Lady 123 Camp Randall Avenue Madison, WI 53701	aunt	10/05/2012	Yes	Description here....

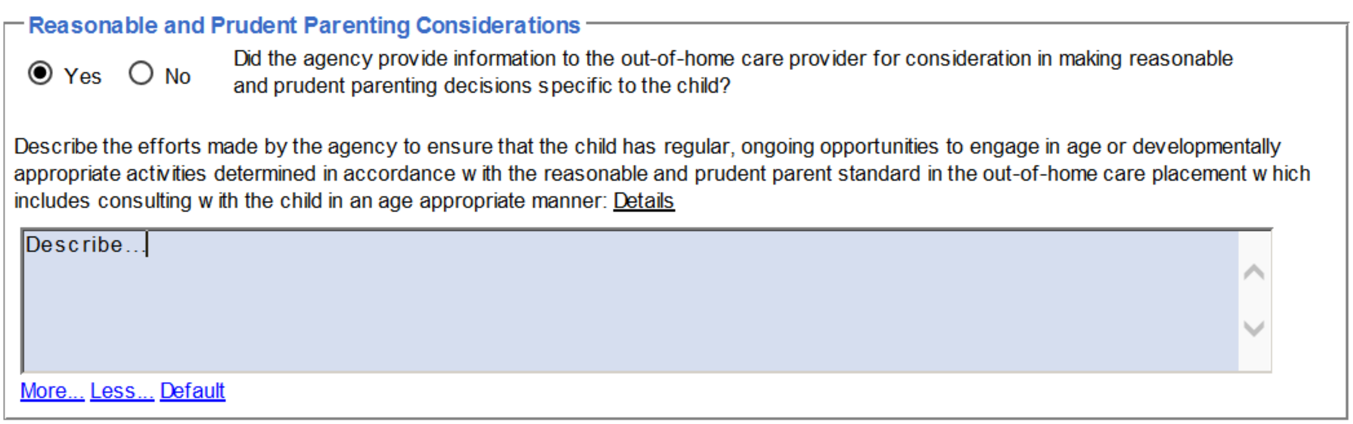
15. In the Consideration of Siblings group box, select the appropriate radio button.



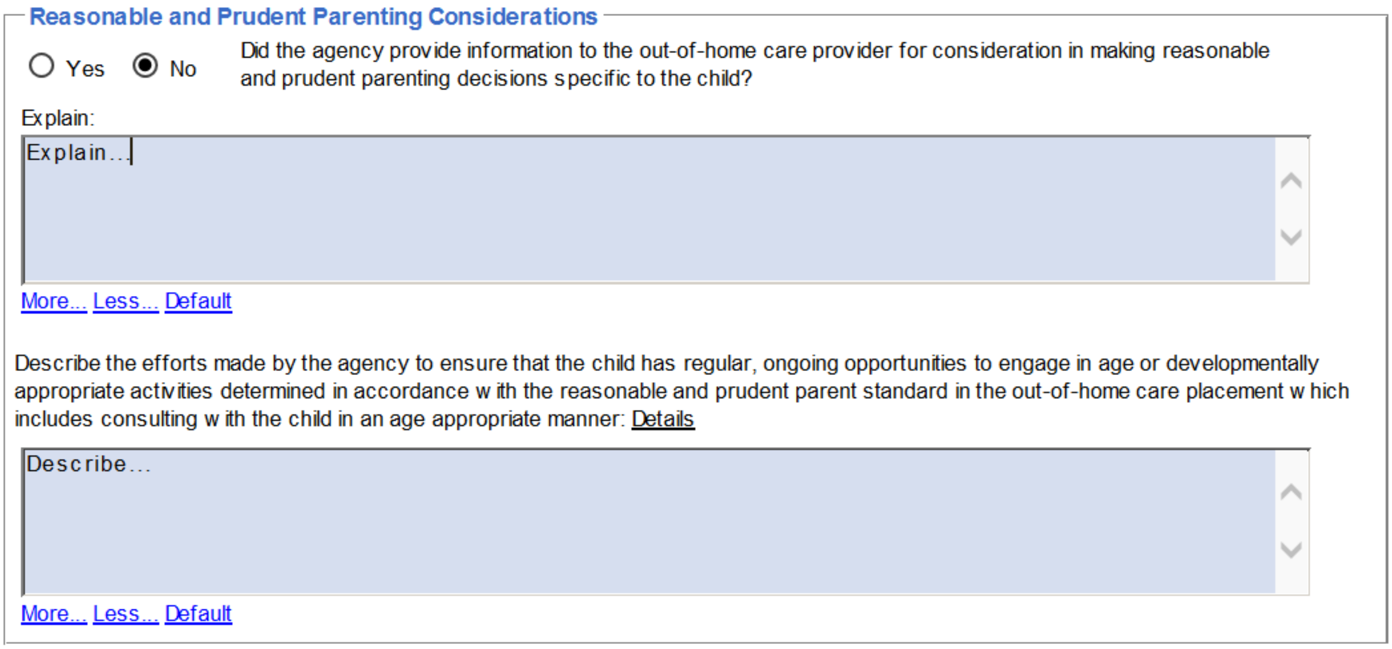
16. In the Location of Placement group box, select the appropriate radio button. If the “No setting is available…” radio button is selected, enter narrative in the associated box.



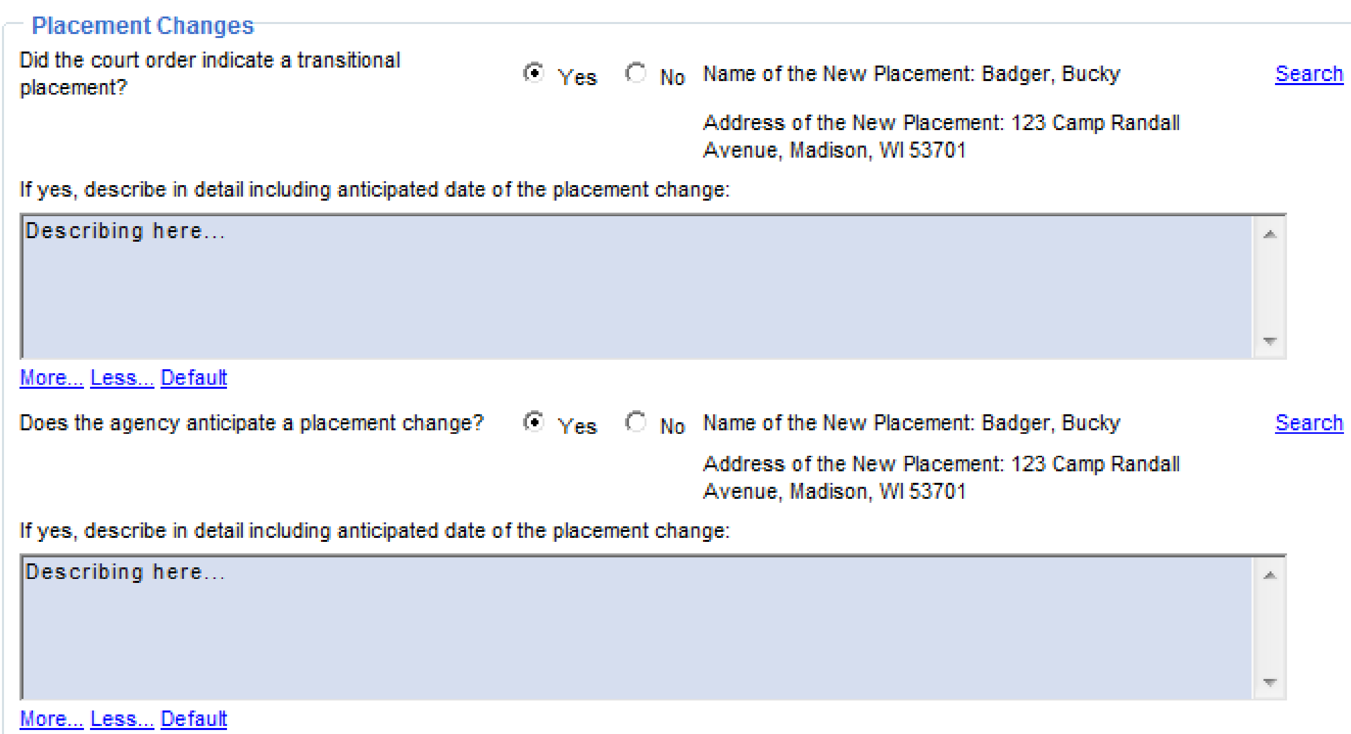
17. In the Reasonable and Prudent Parenting Considerations group box, select the appropriate radio button. If the “Yes” radio button is selected, enter narrative in the associated box.



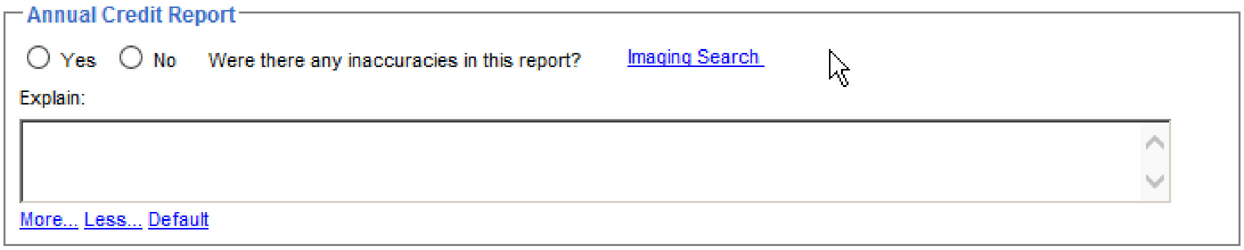
If the “No” radio button is selected, enter narrative in the associated boxes.



18. In the Placement Changes group box, select the Yes or No button for each of the questions. If the court ordered a transitional change or the agency anticipates a placement change, click on the Search hyperlink and search out the upcoming provider. The name and address of the new placement will pre-fill to the plan. Enter text in the associated narrative field.



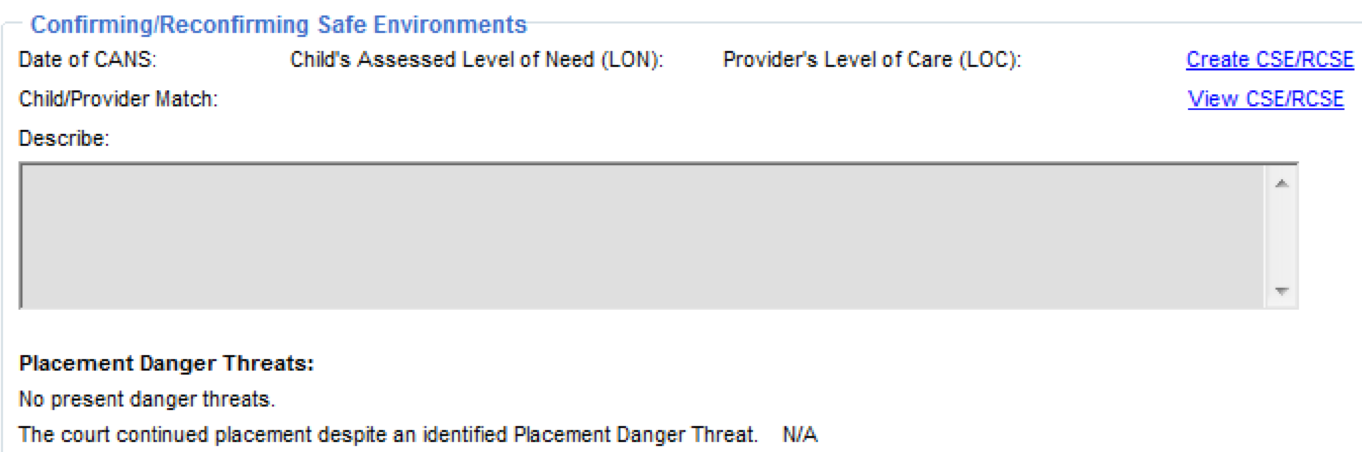
19. In the Annual Credit Report group box, select the Yes or No button for each of the questions. Click the Imaging Search hyperlink to attach an image. If the child is under 16 years of age, only the second question will be displayed. If the child is older than 16, both the questions below will be displayed. Addionally, there is an optional narrative box to enter comments, if any.



20. In the Confirming/Reconfirming Safe Environments group box, information from the most recent Confirming/Reconfirming Safe Environments (CSE/RCSE) will pre-fill. If the CSE/RCSE does not exist, click on the Create CSE/RCSE hyperlink. See the associated Confirming Safe Environments or Reconfirming Safe Environments User Guides for additional information.

Note: If the CSE/RCSE is pending, the hyperlink will read "Modify CSE/RCSE." If the CSE/RCSE is approved, the hyperlink will read "View CSE/RCSE."

Note: There must be an associated approved CSE/RCSE within the past 6 months in order to approve the Permanency Plan.



21. The fifth tab is the Permanency tab. In the Determination of Appropriateness for Concurrent Planning group box, select the Yes or No radio button next to each question. Depending upon how the questions are answered, the agency's determination of whether to engage in concurrent planning will indicate whether current planning is needed. Answer the question, "Despite the agency's determination to engage in concurrent planning, has the court determined that having a concurrent permanency goal is not appropriate?" If Yes is selected, enter the Date.

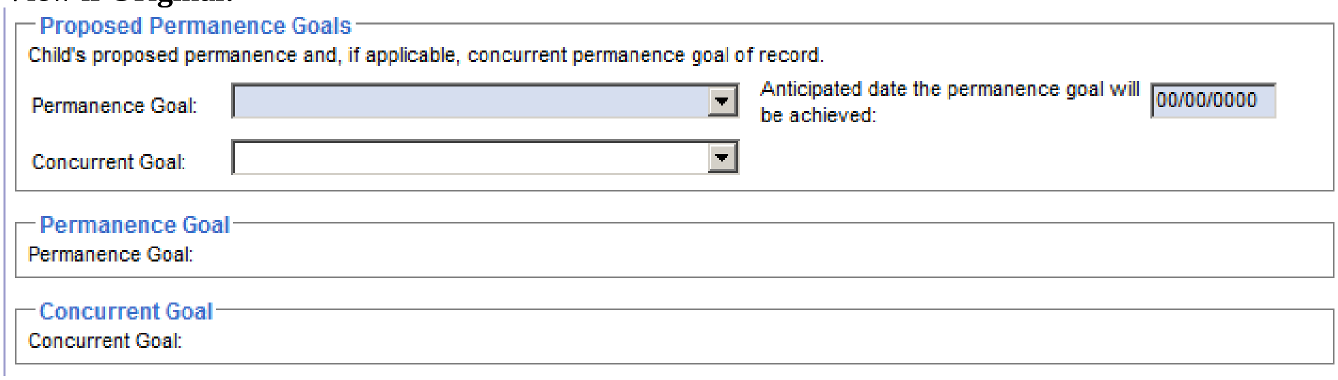
22. If this is a Subsequent plan, select the Permanence Goal from the drop-down in the Current Permanence Goal of Record group box. If applicable, select the Concurrent Goal.

    Note: If the plan is the Original plan, there will be only a Proposed Permanence Goals group box.

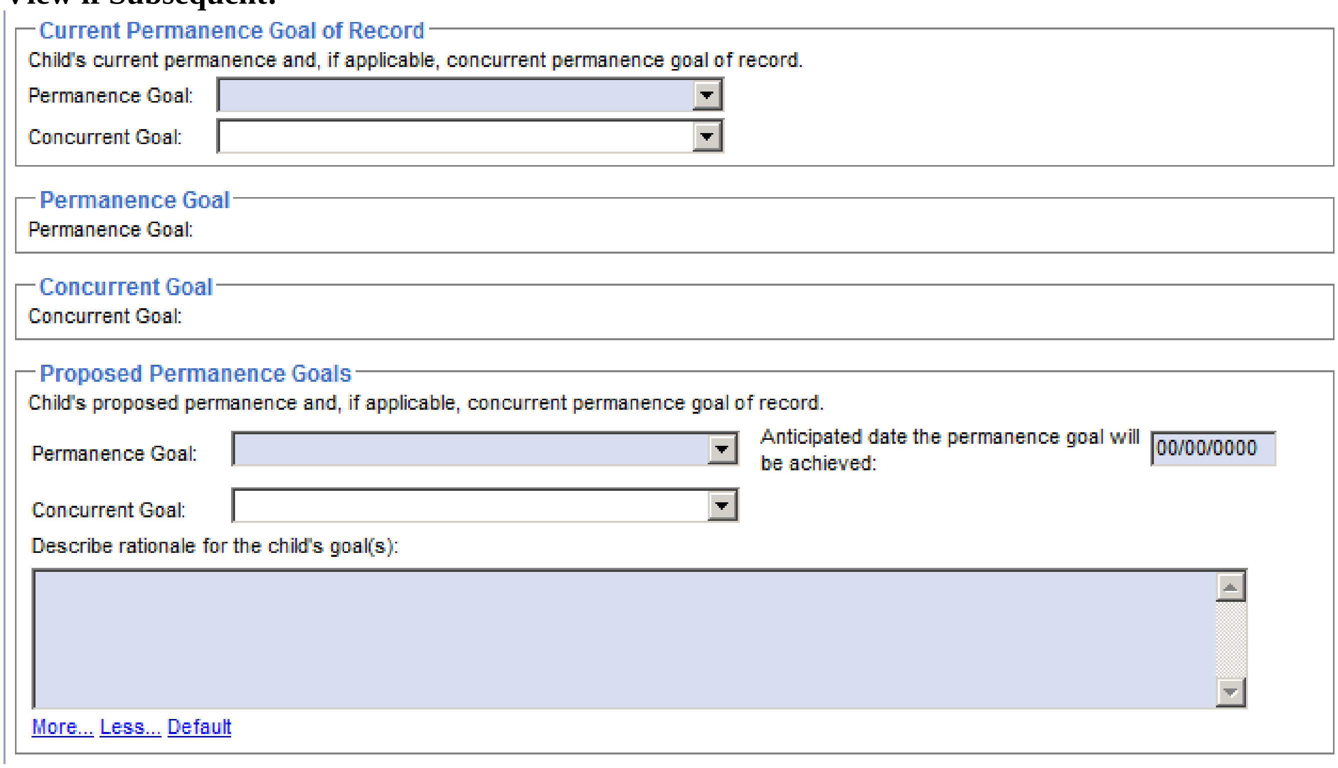
    In the Permanence Goal and Concurrent Goal group boxes, the set of questions will vary, depending upon which goal was selected in the Current Permanence Goal of Record group box. Document a response to each of the questions. If applicable, select the appropriate radio button for the question(s).

23. In the Proposed Permanence Goals group box, select the Permanence Goal from the drop-down and document the anticipated date the permanence goal will be achieved. Describe the rationale for the child's goal(s).

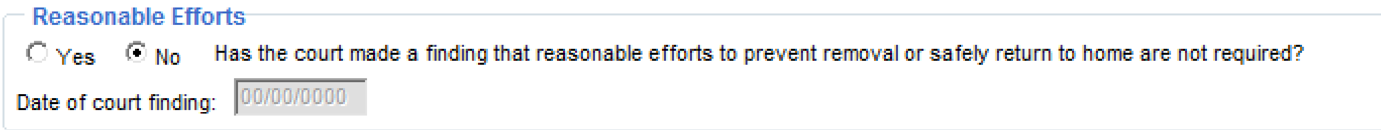
View if Original:



View if Subsequent:



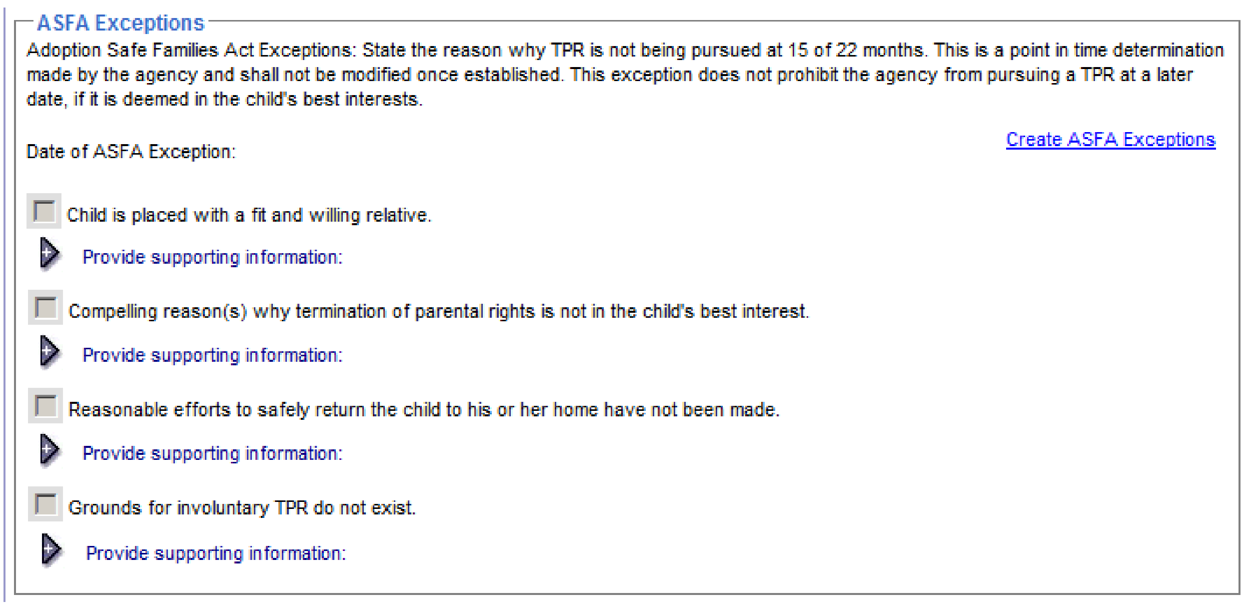
24. Select the radio button for the question in the Reasonable Efforts group box. If Yes, enter the date of the court finding.



25. If a Termination of Parental Rights (TPR) has occurred, the date referred to District Attorney/Corporation Counsel and the date TPR filed will appear. You can create a Legal Record from the Create Legal Record hyperlink if the TPR does not exist.

26. The ASFA Exceptions group box pre-fills if there is an ASFA Exceptions of why TPR was not being pursued at 15 of 22 months. You can create an ASFA Exception from the Create ASFA Exceptions hyperlink if it does not exist. See the associated ASFA Exceptions User Guide to create an ASFA Exceptions.

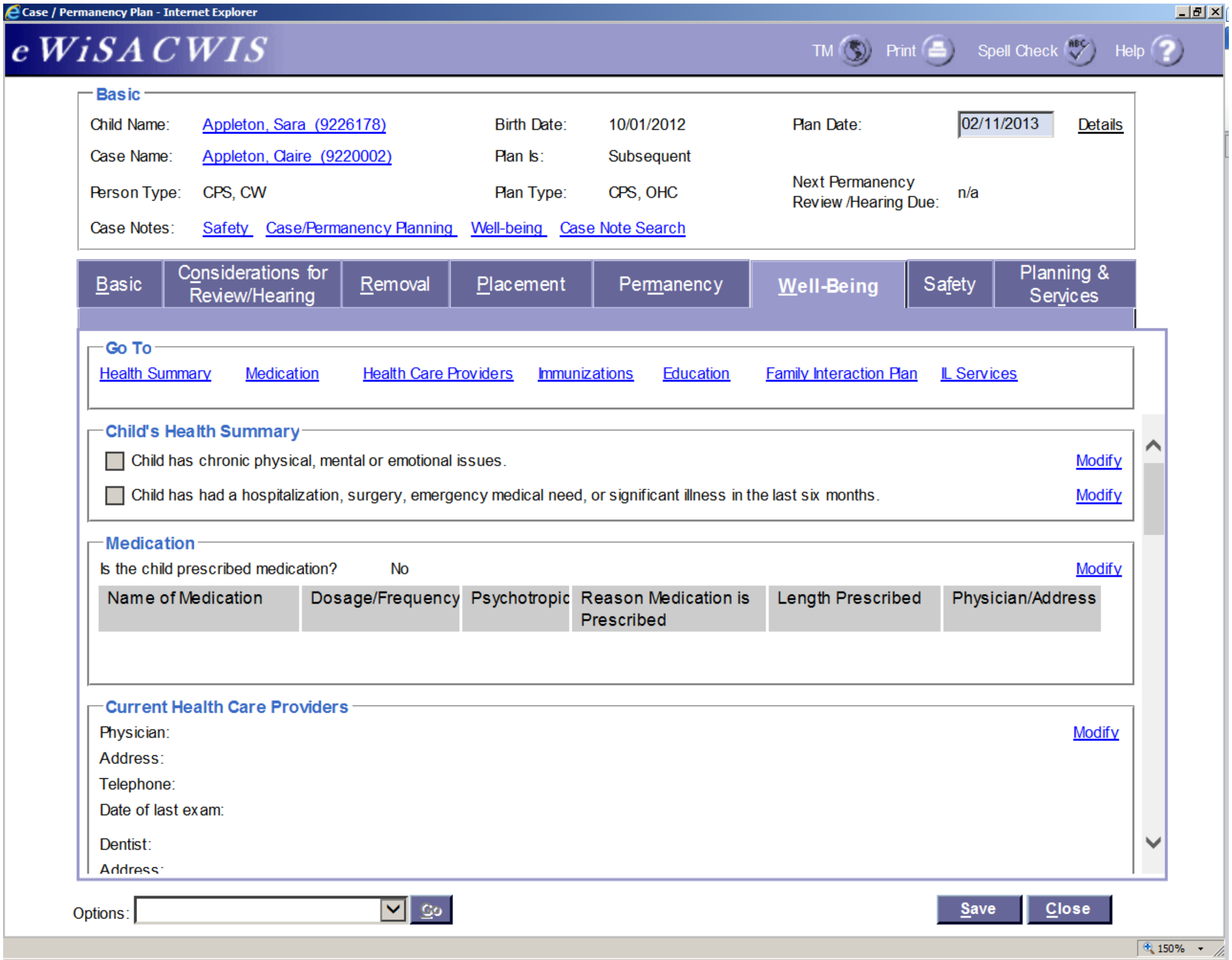
Note: This is a point in time determination that is made by the agency and should not be modified once established, even if circumstances have changed.



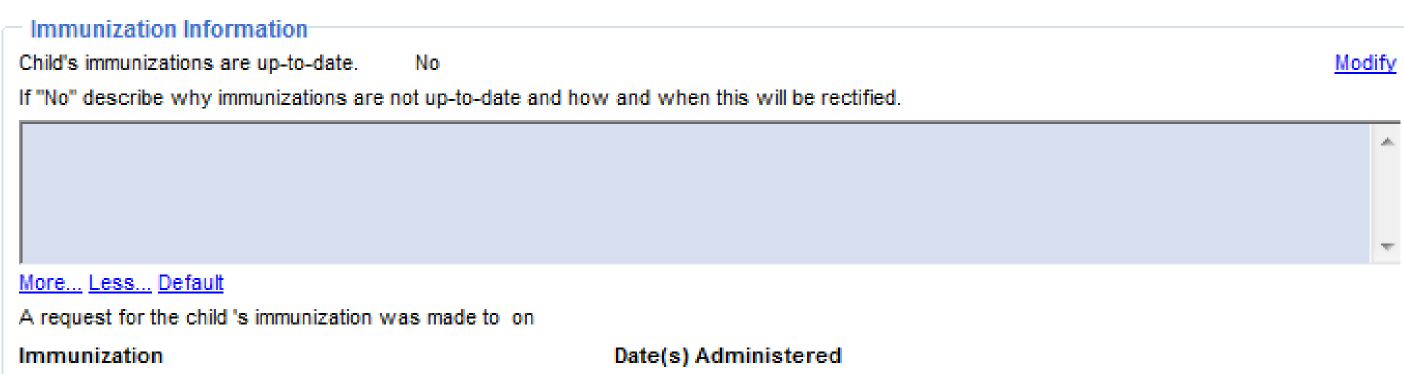
27. The Permanency Review and Permanency Hearing group boxes will pre-fill information from the Permanency Review or Hearing Results page. If this is the original Permanency Plan, the dates will display as N/A.

28. The sixth tab is the Well-Being tab. All information in the Child's Health Summary, Medication, and Current Health Care Providers group boxes pre-fills from the Person Management page. Click on the Modify hyperlink to update the associated information.

Note: Use the 'Go To' links to jump to that specific section of the Well-Bing tab.

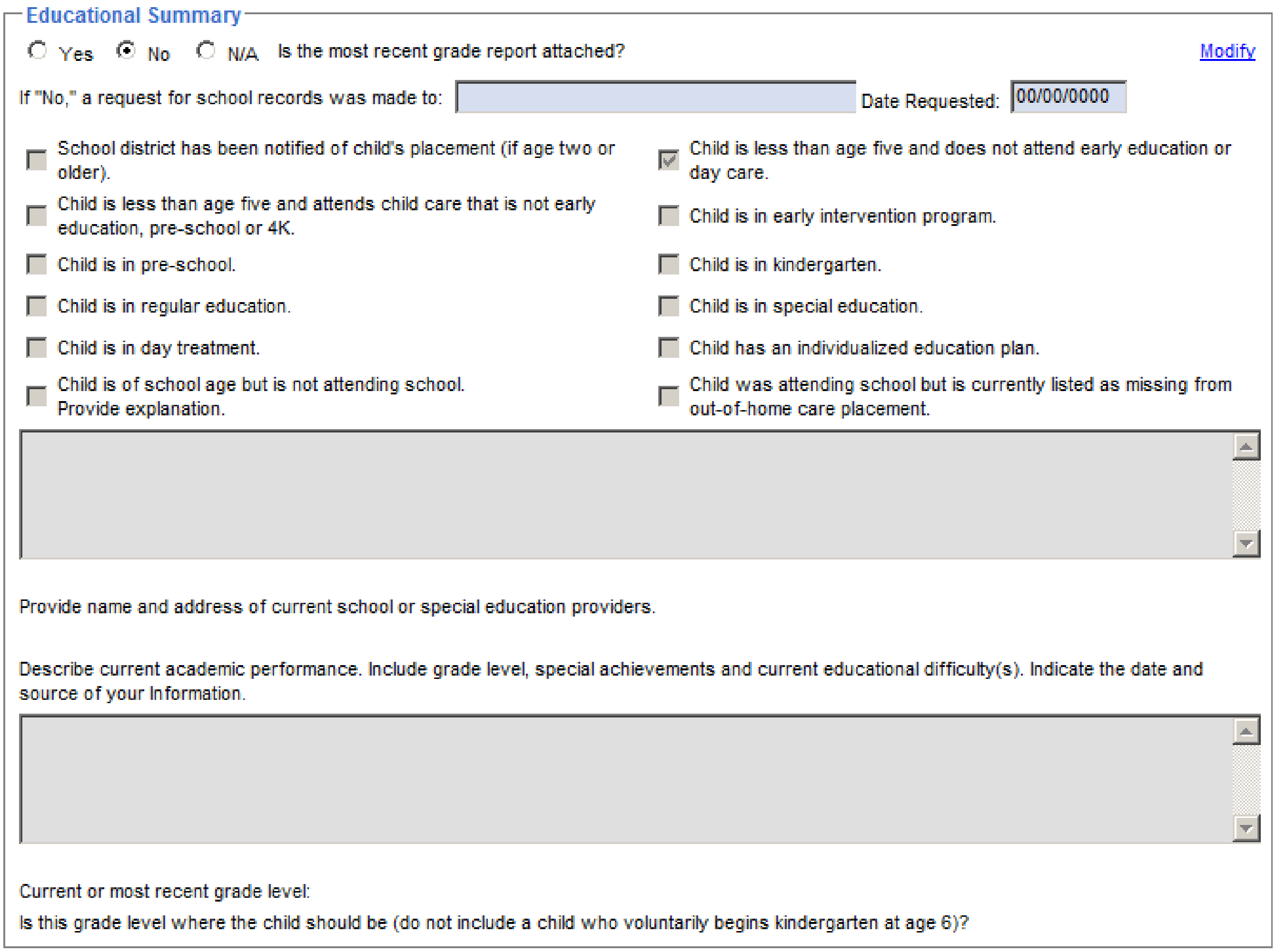


29. If Immunization Information is not entered a narrative box displays to enter the reason why they are not up to date. Click on the Modify hyperlink to update the immunization information.



30. The Educational Summary group box displays all education information. Answer the question, “Is the most recent grade report attached?” If you select No, then document who and when the request for records was made to.

All other information from this group box will pre-fill from the Education tab on Person Management. Click the Modify hyperlink to update the education information.


Educational Summary

Yes No N/A Is the most recent grade report attached? Modify

If "No," a request for school records was made to: Date Requested: 00/00/0000

School district has been notified of child's placement (if age two or older).

Child is less than age five and does not attend early education or day care.

Child is less than age five and attends child care that is not early education, pre-school or 4K.

Child is in early intervention program.

Child is in pre-school.

Child is in kindergarten.

Child is in regular education.

Child is in special education.

Child is in day treatment.

Child has an individualized education plan.

Child is of school age but is not attending school. Provide explanation.

Child was attending school but is currently listed as missing from out-of-home care placement.

Provide name and address of current school or special education providers.

Describe current academic performance. Include grade level, special achievements and current educational difficulty(s). Indicate the date and source of your Information.

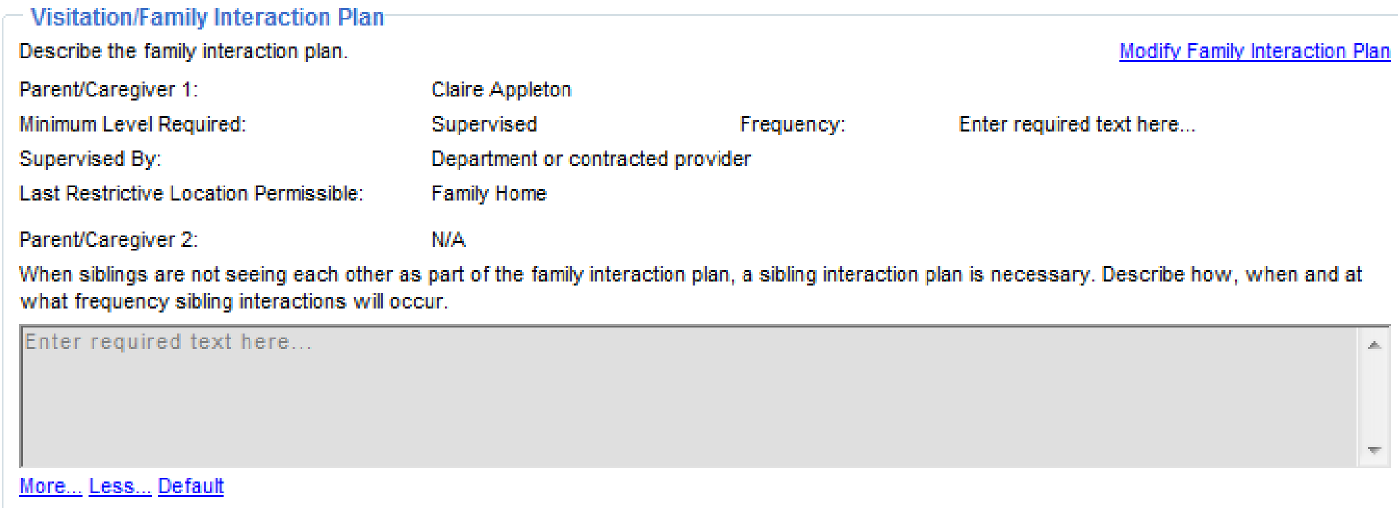
Current or most recent grade level:

Is this grade level where the child should be (do not include a child who voluntarily begins kindergarten at age 6)?

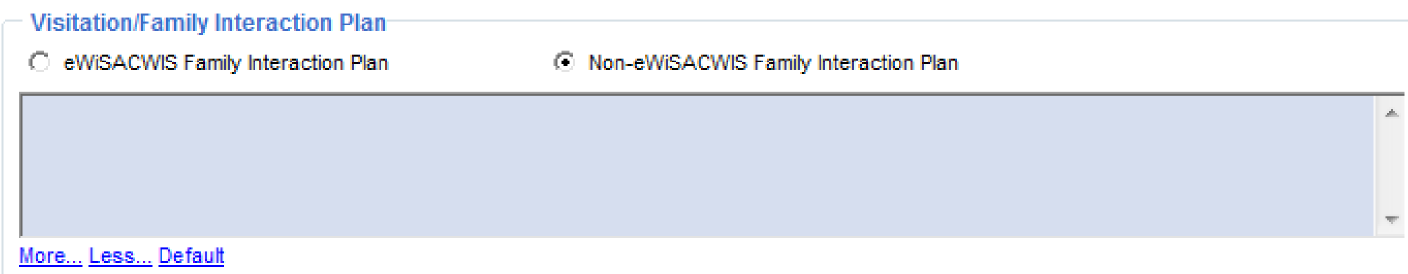
31. In the Visitation/Family Interaction Plan group box, information from the associated Family Interaction Plan will pre-fill. If the Family Interaction Plan does not exist, click on the Create Family Interaction Plan hyperlink. See the associated Family Interaction Plan User Guide for additional information.

Note: If the Family Interaction Plan is pending, the hyperlink will read "Modify Family Interaction Plan." If the Family Interaction Plan is approved, the hyperlink will read "View Family Interaction Plan."

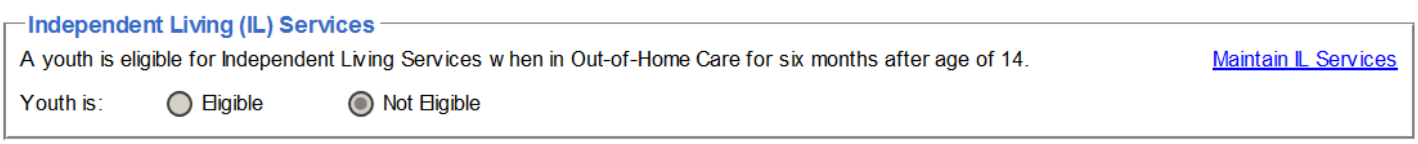
Note: There must be an approved associated Family Interaction Plan in order to approve the Permanency Plan.



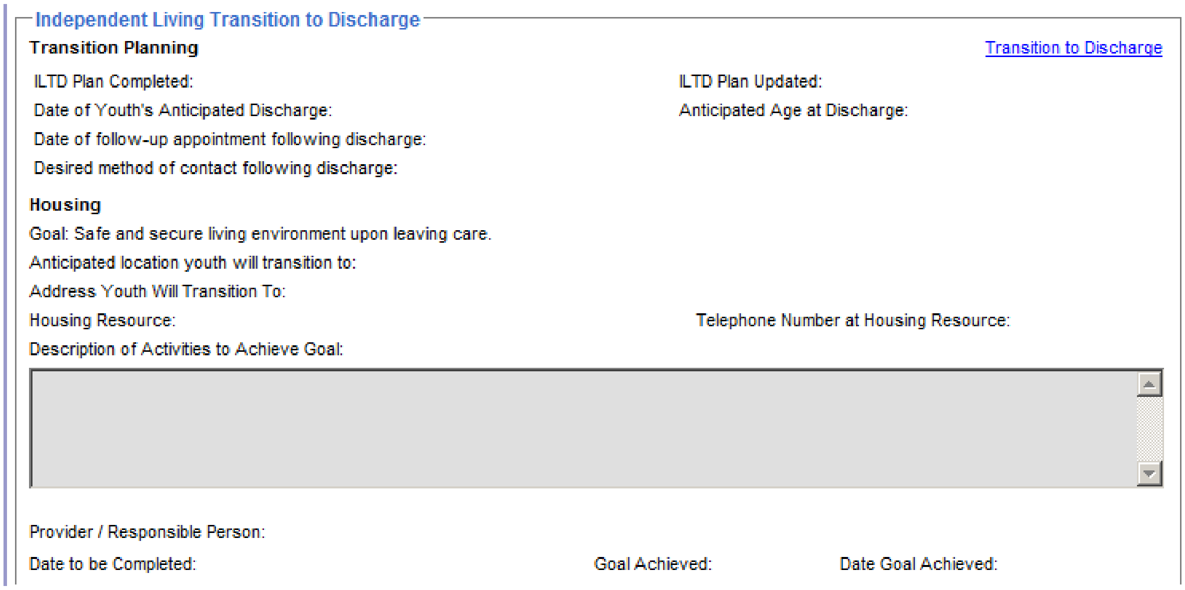
Note: If the Person Type for the child does not include CPS, then the eWiSACWIS version of the Family Interaction Plan is not required. If applicable, select the Non-eWiSACWIS Family Interaction Plan radio button and describe the family interaction plan.



32. In the Independent Living (IL) Services group box, you can maintain the services by selecting the Maintain IL Services hyperlink.

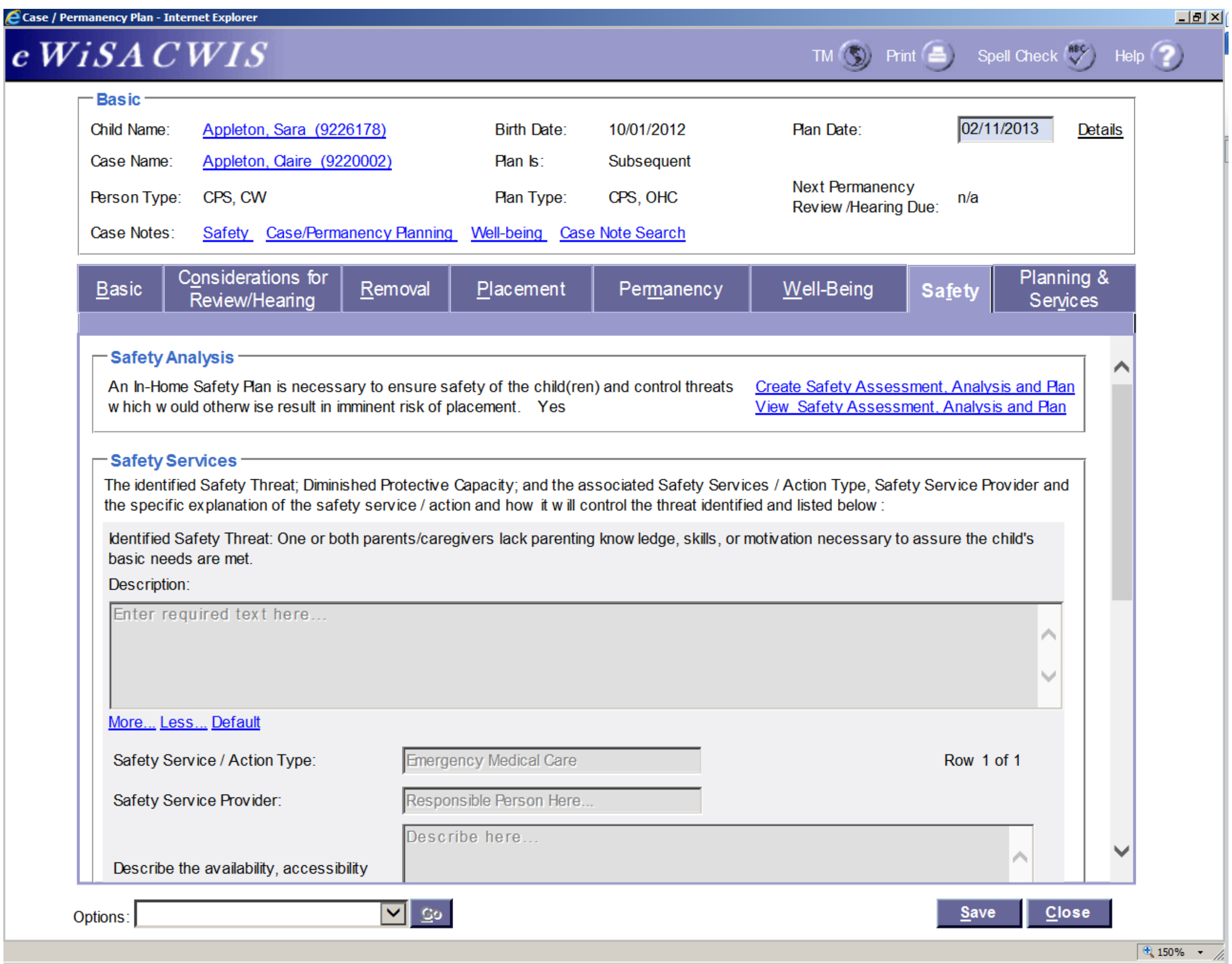


33. The Independent Living Transition to Discharge group box will display once the youth has reached 17 ½ years old. This information pre-fills from the Independent Living page and can be updated by selecting the Transition to Discharge hyperlink.

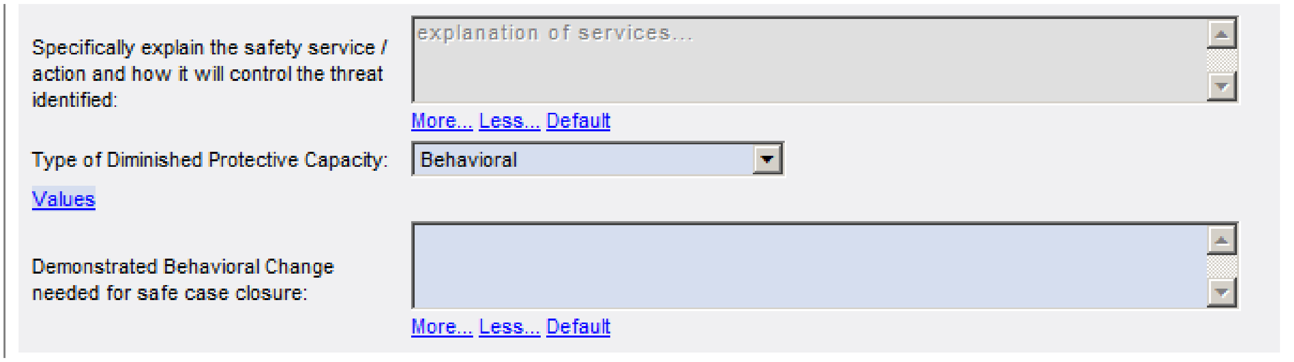


34. The seventh tab is Safety (this tab will only display if the Person Type is CPS). From this tab, you can select the Create Safety Assessment, Analysis and Plan hyperlink to create a Safety Assessment, Analysis Plan.

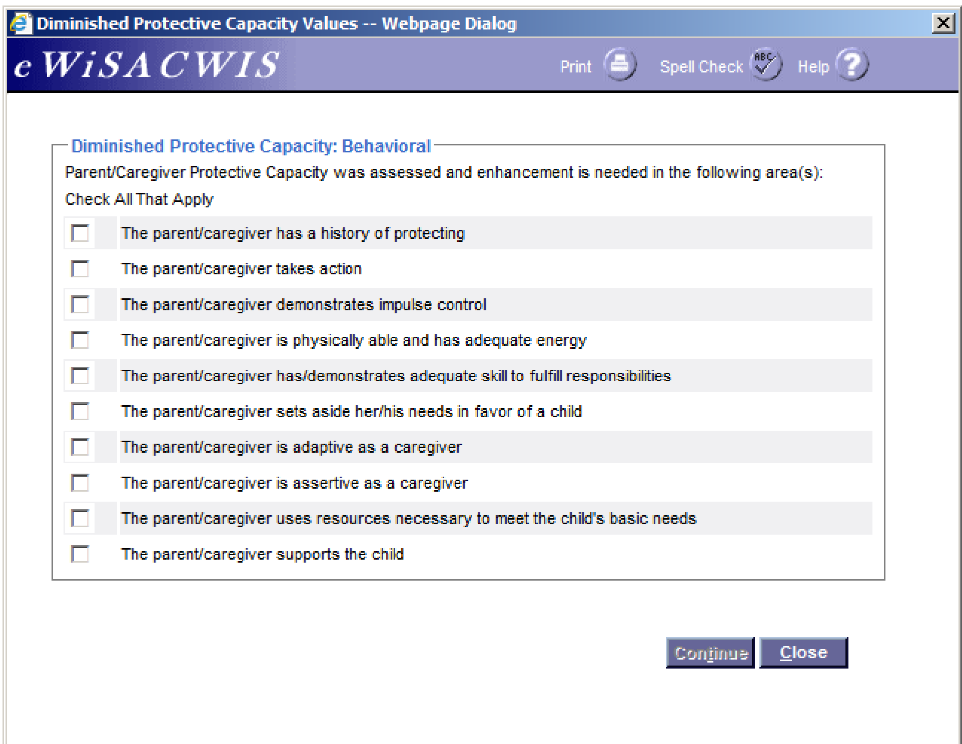
Note: When the Person Type is CPS, there must be an approved associated Safety Assessment, Analysis Plan in order to approve the Permanency Plan.



If Safety Services exist, select the Type of Diminished Protective Capacity, this will automatically launch the Diminished Protective Capacity Values page. The Values hyperlink can be used to return to the Diminished Protective Capacity Values page.

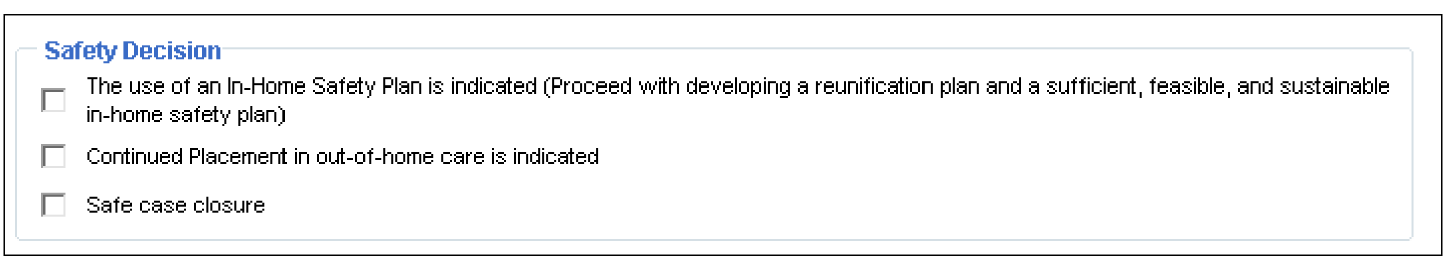


On the Diminished Protective Capacity Values page, select all applicable values. Click Continue to return to the Case/Permanency Plan page.



Document the Demonstrated Behavioral Change needed for safe case closure.

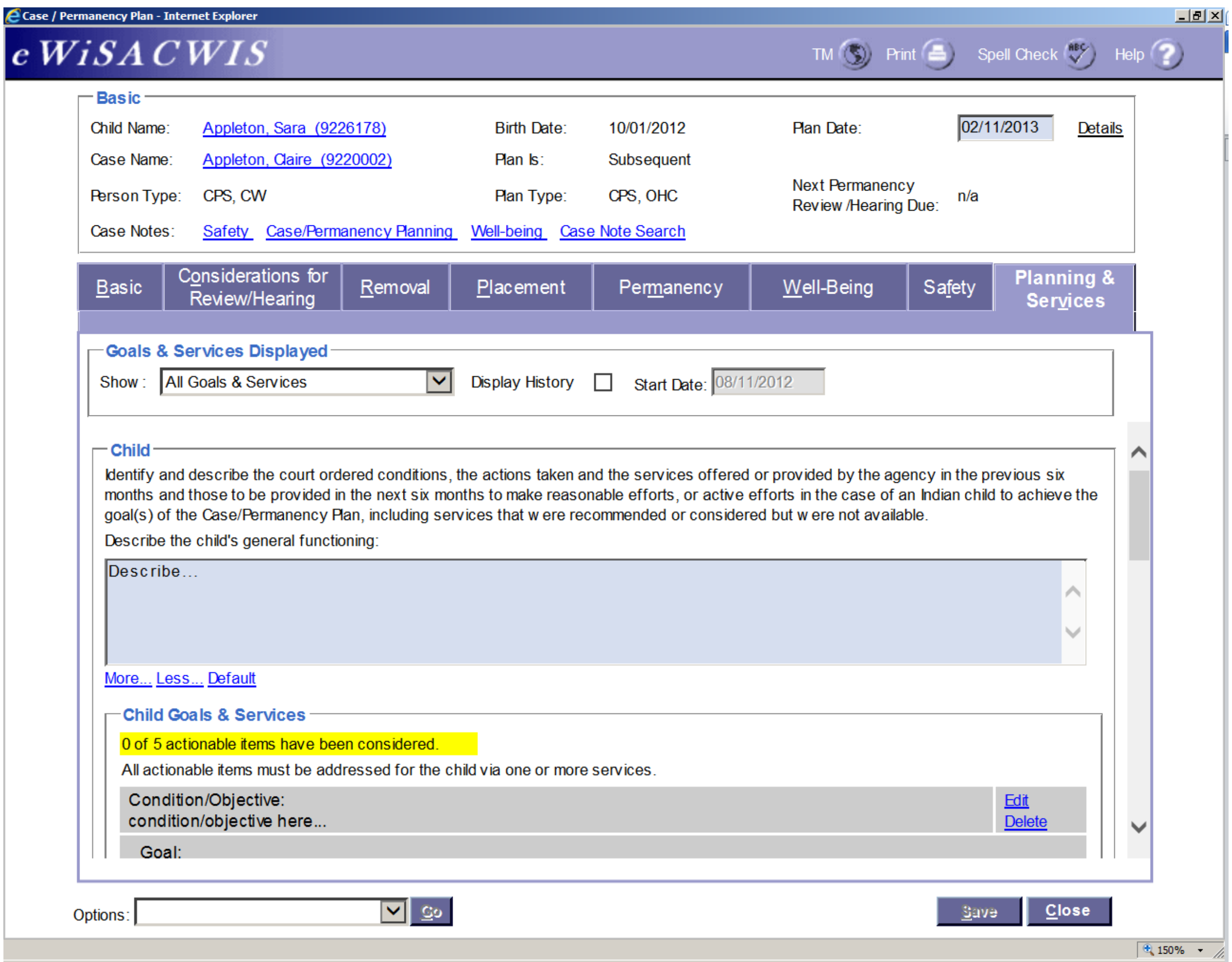
35. In the Safety Decision group box, select the applicable checkboxes.



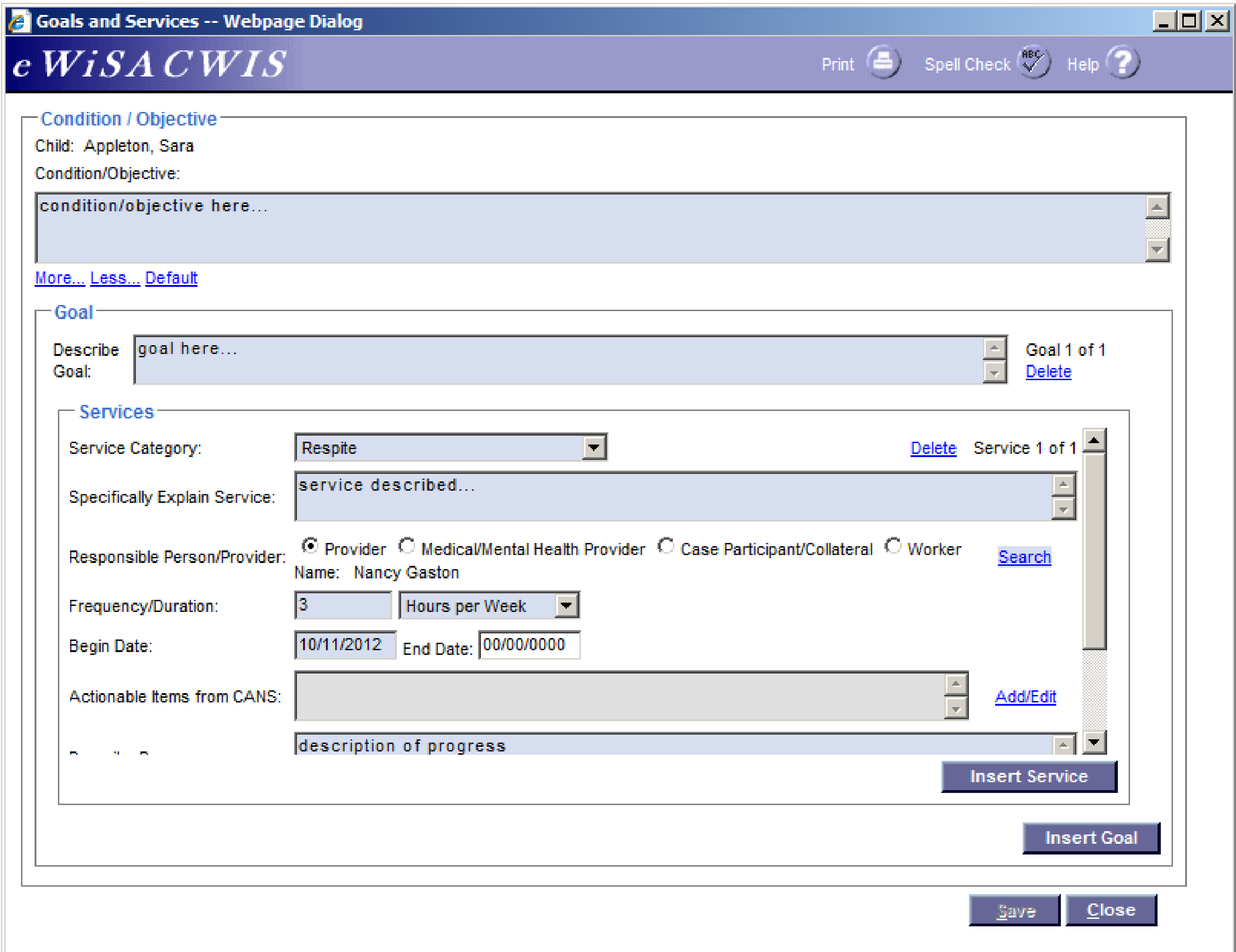
36. The last tab is the Planning & Services tab. By default this tab displays goals and services which were provided in the last 6 months or will be provided in the next 6 months. The 'Show' dropdown in the Goals & Services Displayed group box can be used to filter which Goals & Services display on the page. Also checking the Display History check box will display goals and services that have ended over 6 months ago.

    The Child group box will pre-fill information from the most recent pending or approved Assessment, if applicable. Enter the child's general functioning information. Click Insert in the Child Goals & Services group box to add child goals and services. This will open the Goals and Services page. Click Import to copy goals and/or services from another plan on the case. This will open the Goals and Services Summary page. See step 46 on page 26 for the import feature.

    Note: The text highlighted in yellow displays the number of actionable items from CANS that need to be addressed.

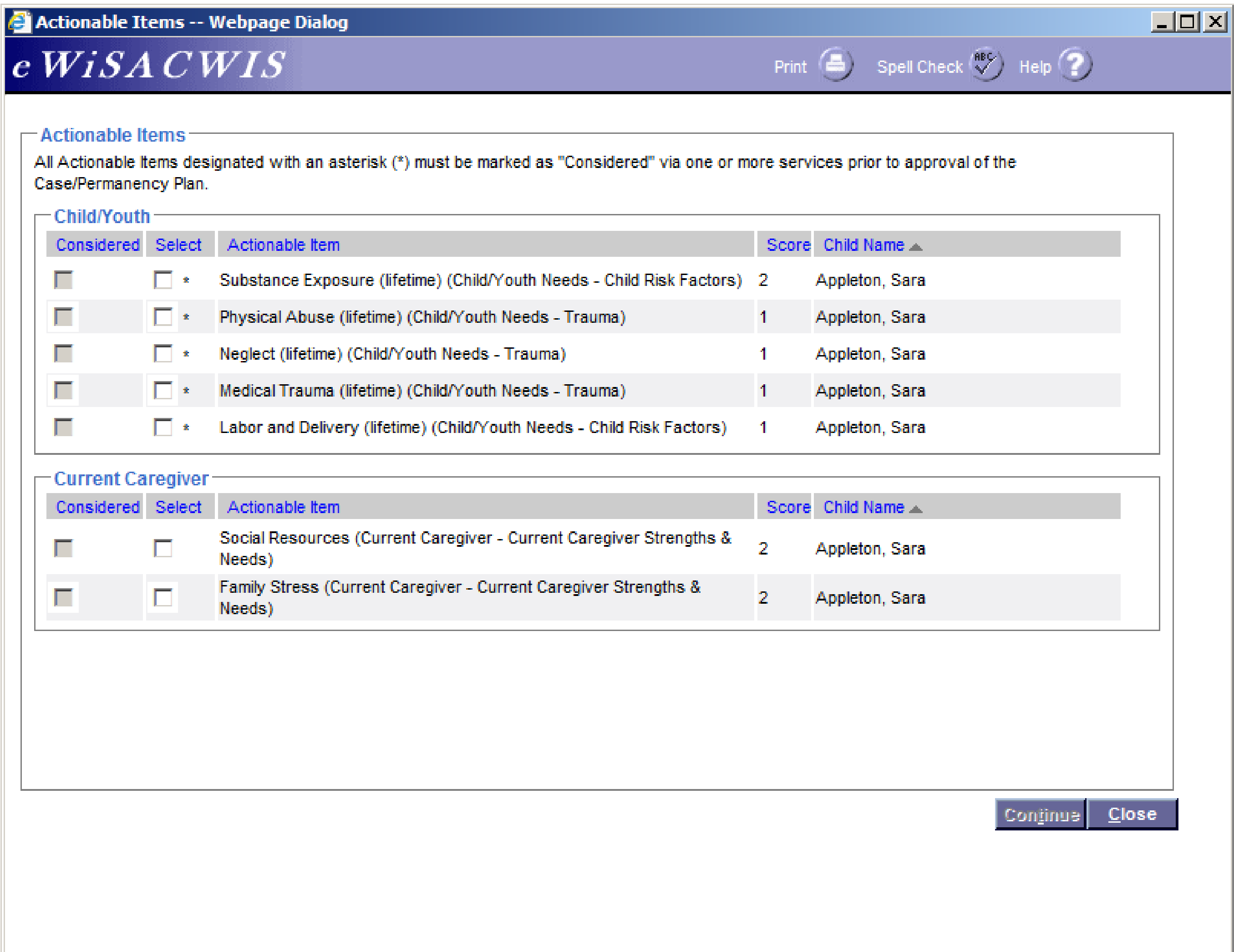


37. On the Goals and Services page (accessed via the Insert button on the Planning & Services tab of the Case/Permanency Plan page), enter a condition/objective and describe the goal. In the Services group box, select the Service Category and explain the service. In the Responsible Person/Provider section, select the Provider, Medical/Mental Health Provider, Case Participant/Collateral or Worker radio button. Then click the Search hyperlink and search for the appropriate responsible person/provider. Enter the Frequency/Duration and Begin Date. If applicable, document the End Date. Click on the Add/Edit hyperlink next to the Actionable Items from CANS. This will open the Actionable Items page.



38. On the Actionable Items page, select all applicable actionable items that relate to the service. Then click Continue to return to the Case/Permanency Plan page.

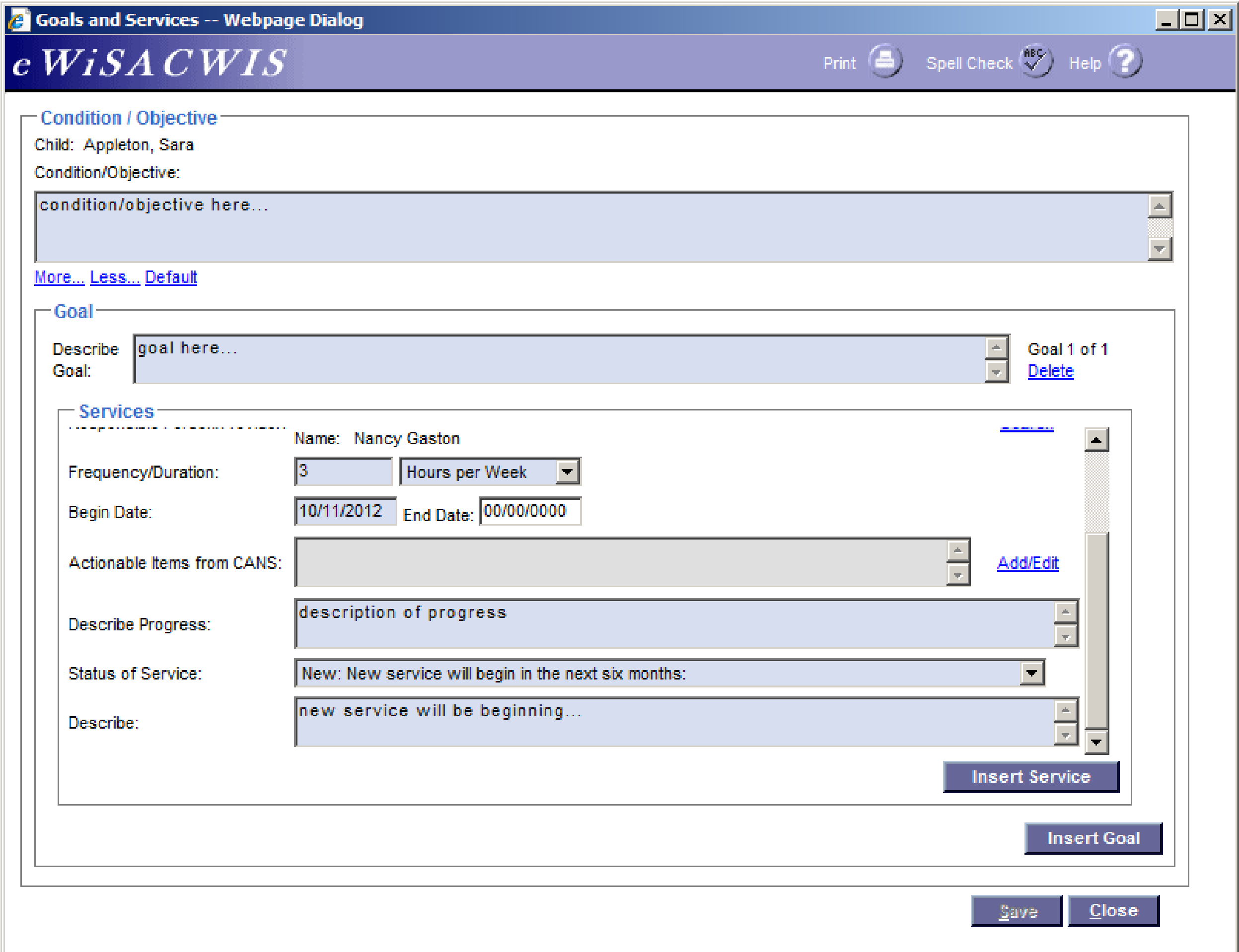
Note: This page will display all actionable items from the child's most recent CANS. Each of the items with an asterisk must be addressed with one or more service. All actionable items for the child (excludes the actionable items for the current caregiver and primary identified permanent resource) must be addressed/considered in order to approve the Permanency Plan.



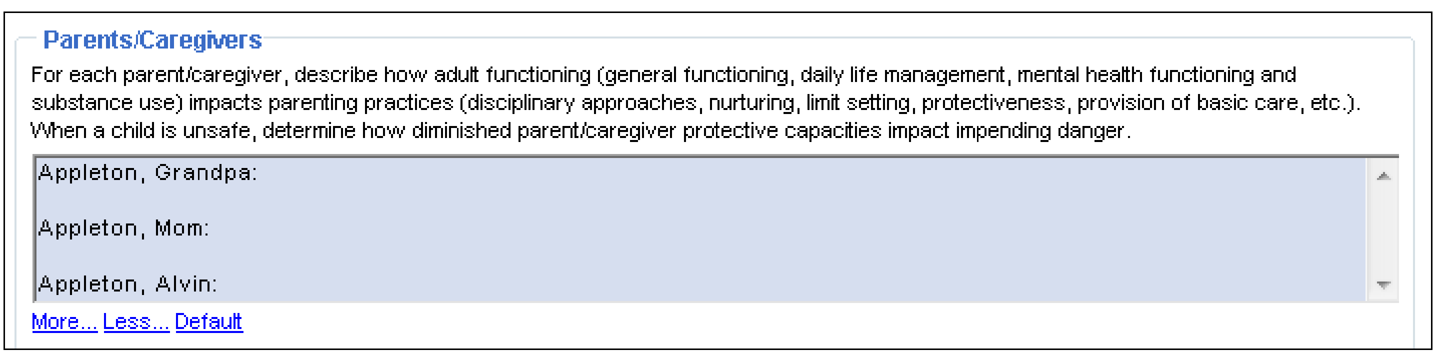
Considered	Select	Actionable Item	Score	Child Name
	*	Substance Exposure (lifetime) (Child/Youth Needs - Child Risk Factors)	2	Appleton, Sara
	*	Physical Abuse (lifetime) (Child/Youth Needs - Trauma)	1	Appleton, Sara
	*	Neglect (lifetime) (Child/Youth Needs - Trauma)	1	Appleton, Sara
	*	Medical Trauma (lifetime) (Child/Youth Needs - Trauma)	1	Appleton, Sara
	*	Labor and Delivery (lifetime) (Child/Youth Needs - Child Risk Factors)	1	Appleton, Sara

Considered	Select	Actionable Item	Score	Child Name
		Social Resources (Current Caregiver - Current Caregiver Strengths & Needs)	2	Appleton, Sara
		Family Stress (Current Caregiver - Current Caregiver Strengths & Needs)	2	Appleton, Sara

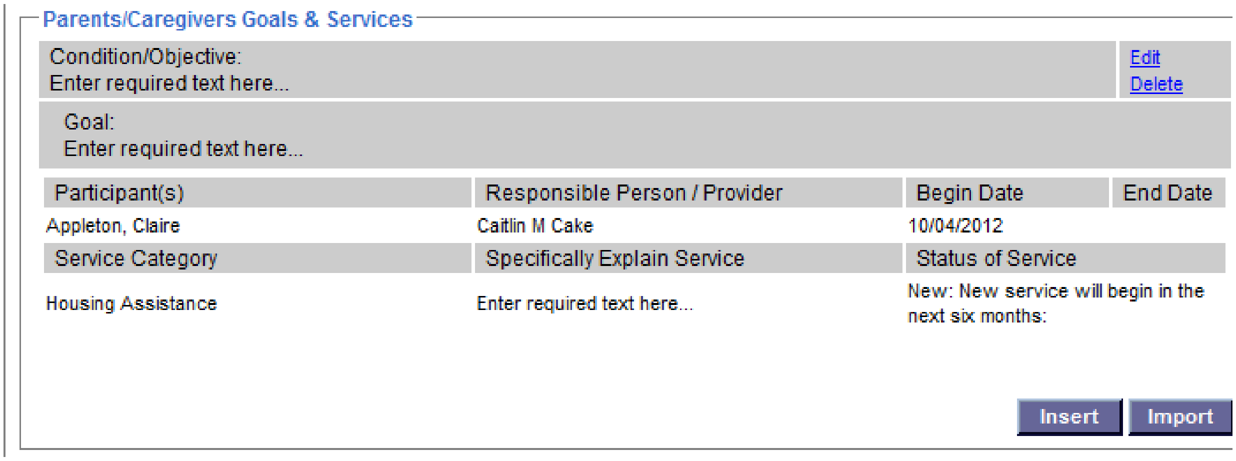
39. Describe the progress, select the status of the service, and document the description of the status. Click the Insert Service or Insert Goal buttons to add additional services or goals to this condition/objective. Click Save and Close to return to the Case/Permanency Plan page.



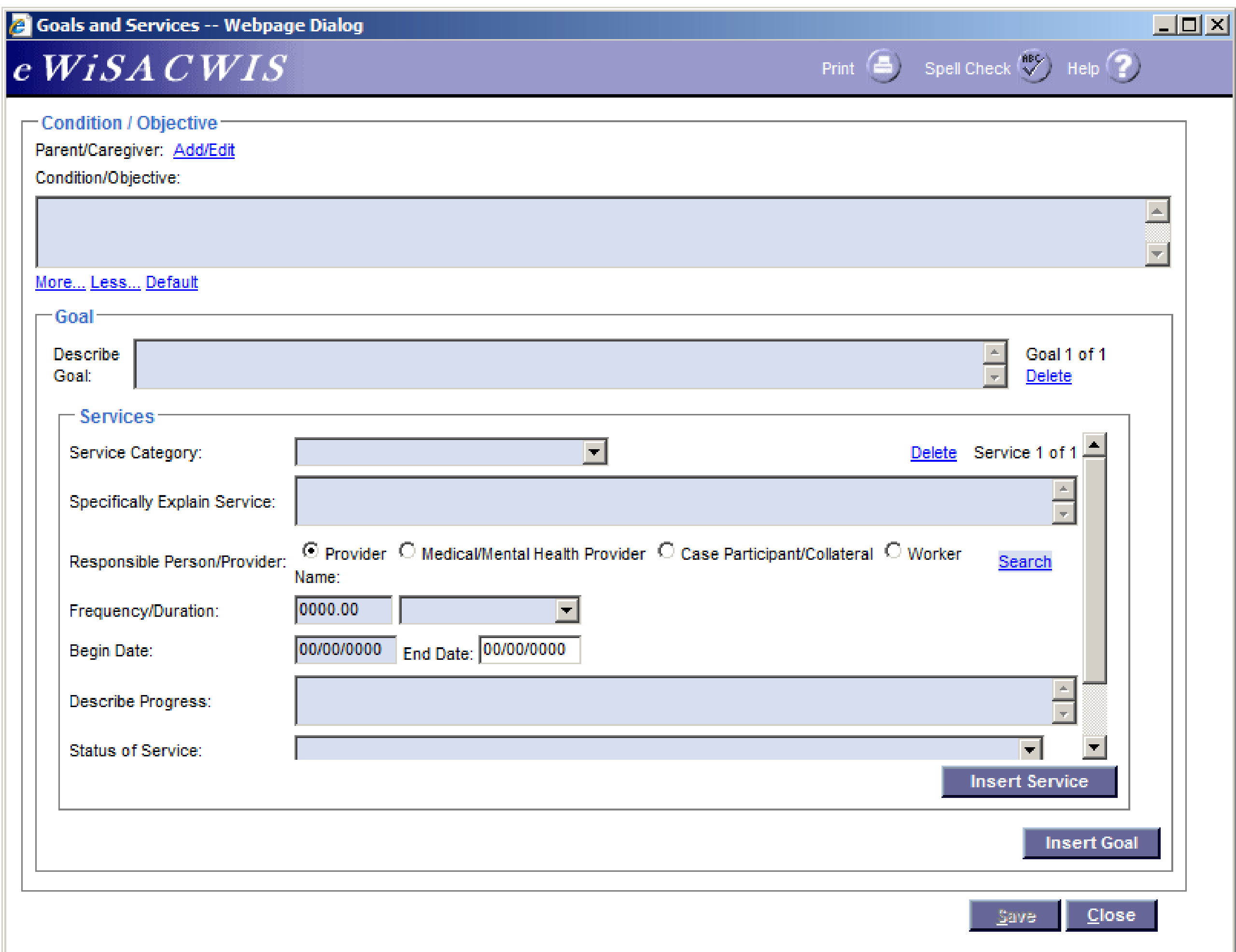
40. On the Planning & Services tab, the Parents/Caregivers group box will pre-fill information from the most recent pending or approved Assessment. This narrative box is enabled to enter additional information.



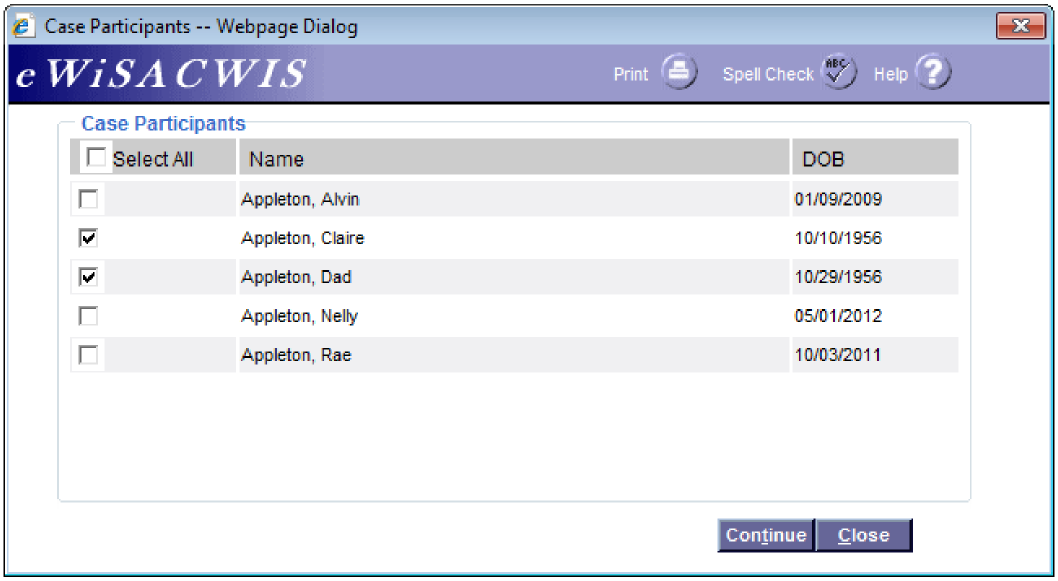
41. In the Parents/Caregivers Goals & Services group box, select the Insert button to add goals for the parents/caregiver. This will open the Goals and Services page.



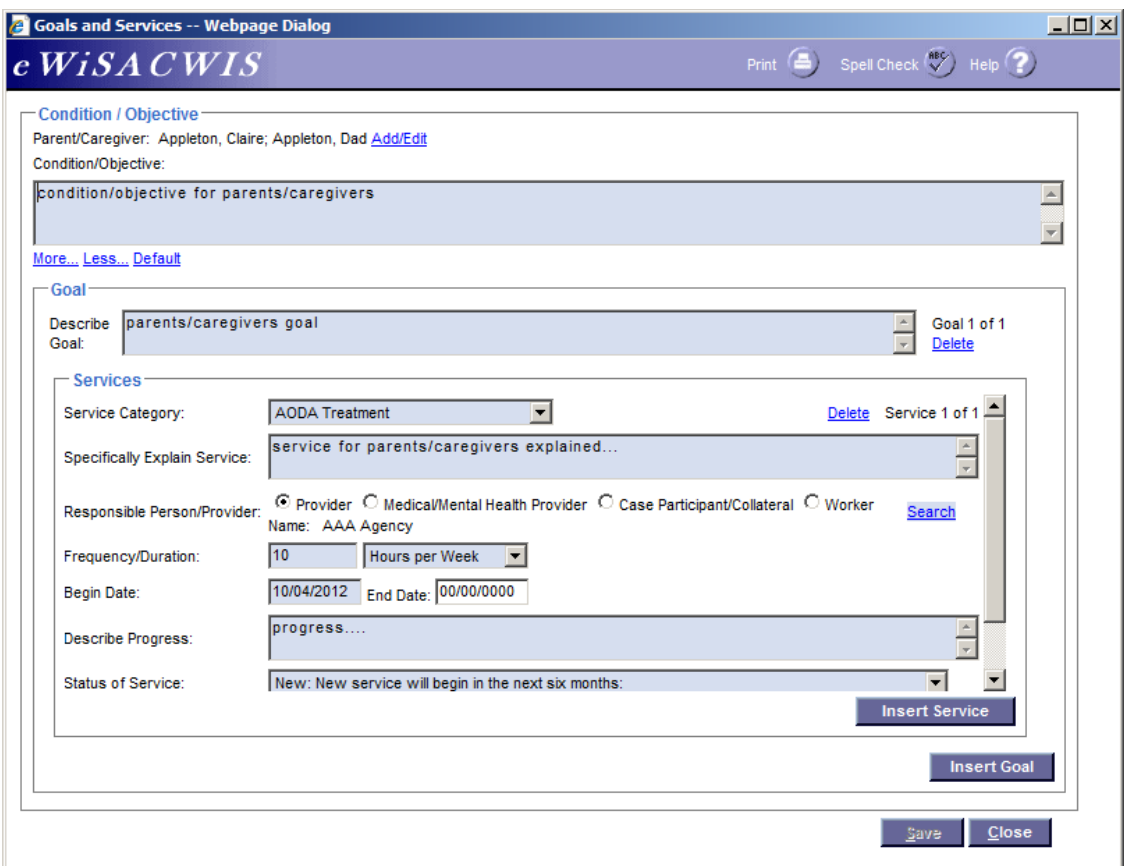
42. On the Goals and Services page, click the Add/Edit hyperlink to add the parents/caregivers these goals and services are associated to.



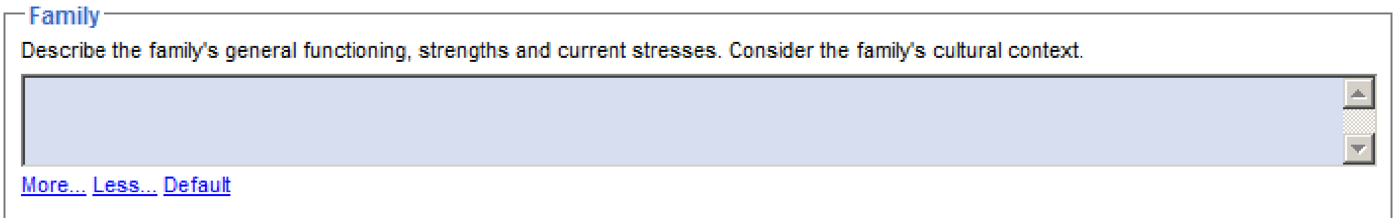
43. On the Case Participants page, select the applicable parents/caregivers. Click Continue to return to the Goals and Services page.



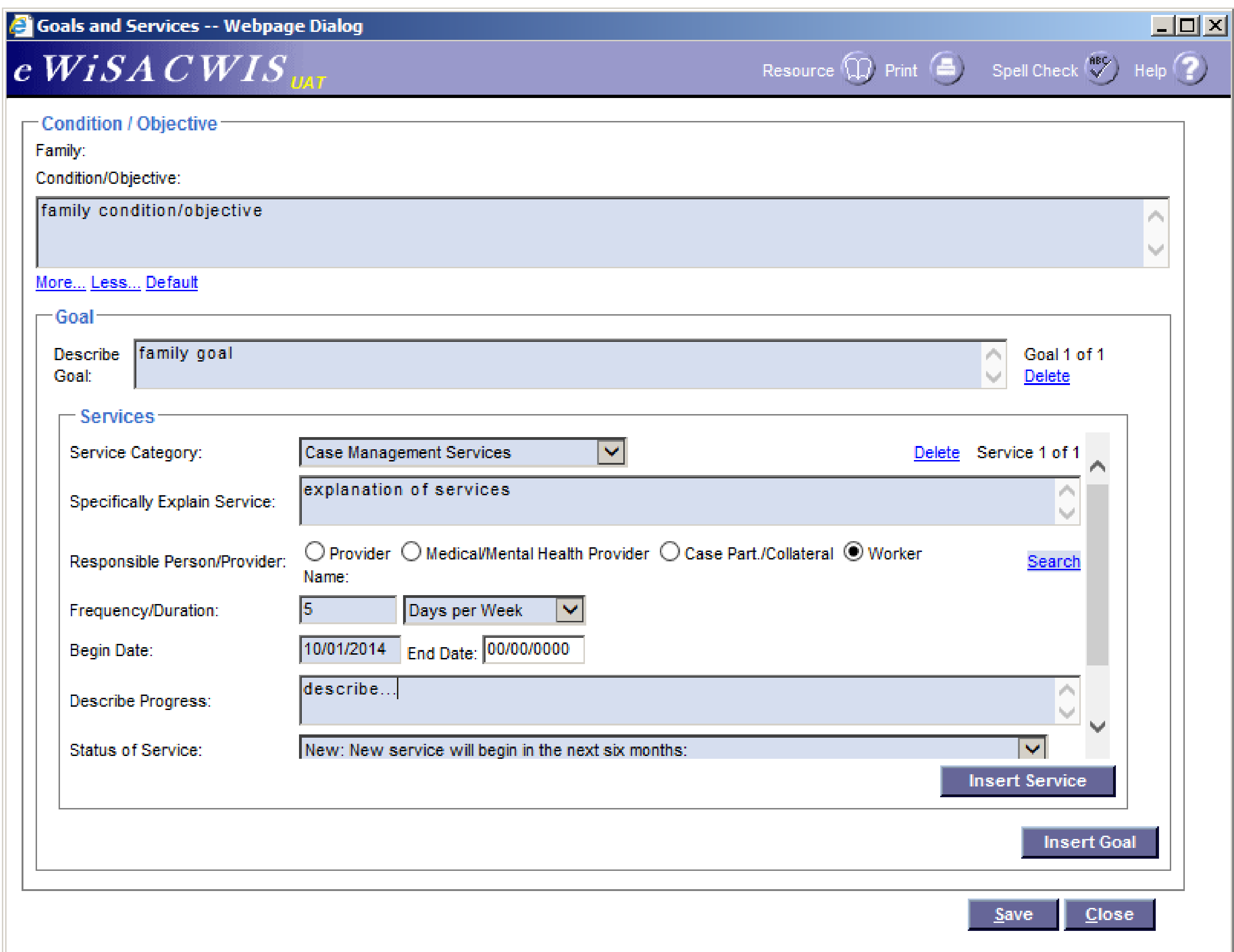
44. On the Goals and Services page, enter a condition/objective and describe the goal. In the Services group box, select the Service Category and explain the service. In the Responsible Person/Provider section, select either the Provider, Medical/Mental Health Provider, Case Participant/Collateral or Worker radio button. Then click the Search hyperlink and search for the appropriate responsible person/provider. Enter the Frequency/Duration and Begin Date. If applicable, document the End Date. Describe the progress, select the status of the service, and document the description of the status. Click the Insert Service or Insert Goal buttons to add additional services or goals to this condition/objective. Click Save and Close to return to the Case/Permanency Plan page.



45. In the Family group box, the narrative pre-fills the family's general functioning from the most recent pending or approved Assessment, if applicable. In the Family Goals & Services group box, select the Insert button to add goals and services for the family. This will open the Goals and Services page.

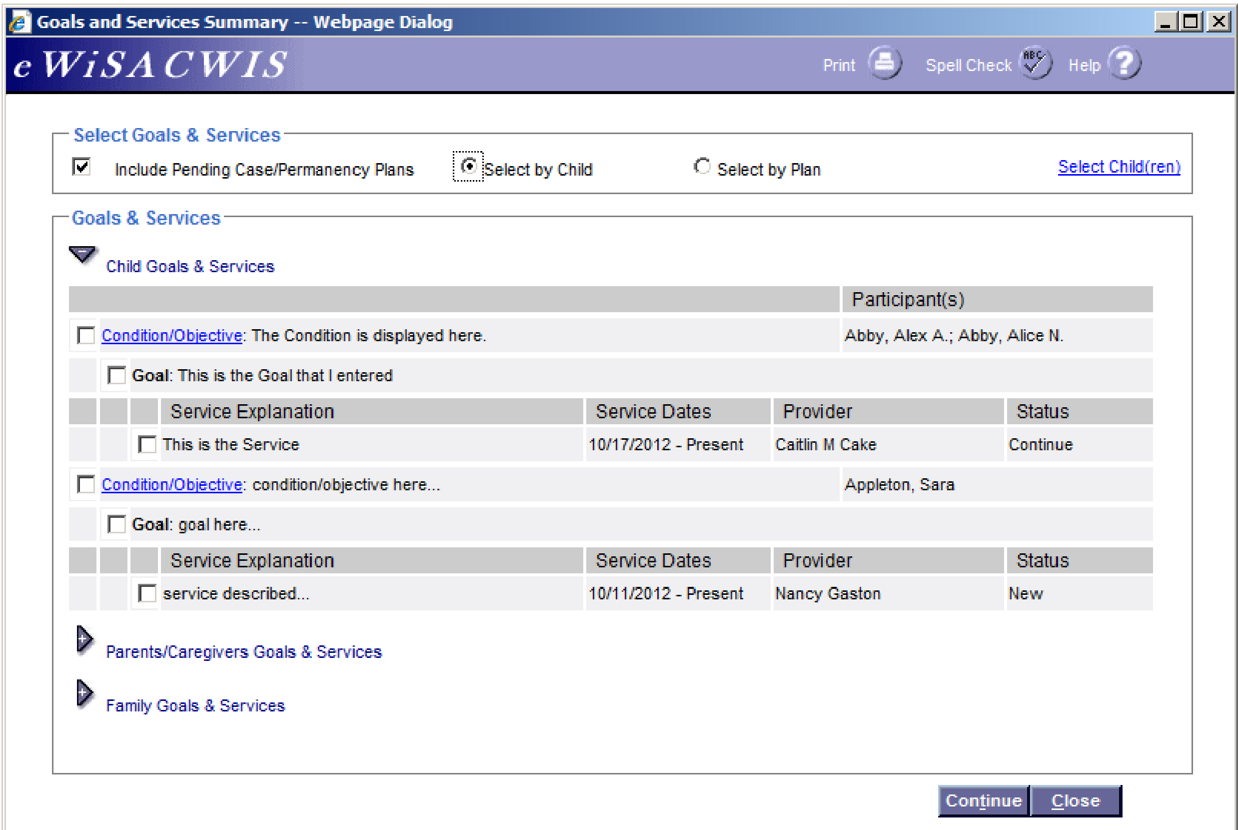


46. On the Goals and Services page, enter a condition/objective and describe the goal. In the Services group box, select the Service Category and explain the service. In the Responsible Person/Provider section, select either the Provider, Medical/Mental Health Provider, Case Participant/Collateral or Worker radio button. Then click the Search hyperlink and search for the appropriate responsible person/provider. Enter the Frequency/Duration and Begin Date. If applicable, document the End Date. Describe the progress, select the status of the service, and document the description of the status. Click the Insert Service or Insert Goal buttons to add additional services or goals to this condition/objective. Click Save and Close to return to the Case/Permanency Plan page.



47. As noted above, clicking the Import button under the Child Goals & Services, Parents/Caregiver Goals & Services, or Family Goals & Services brings up the Goals and Services Summary page. This page is used to copy goals from other Case/Permanency Plans on the case. By default, the Goals and Services Summary page will display expanded for whichever section [Child, Parents/Caregiver, or Family] that the Import button was clicked under, click the button to expand the other sections.

The Select Goals & Services group box is used to filter which plans the goals and services on this page will come from. Unchecking Include Pending Case/ Permanency Plans will hide any plan in a pending status.

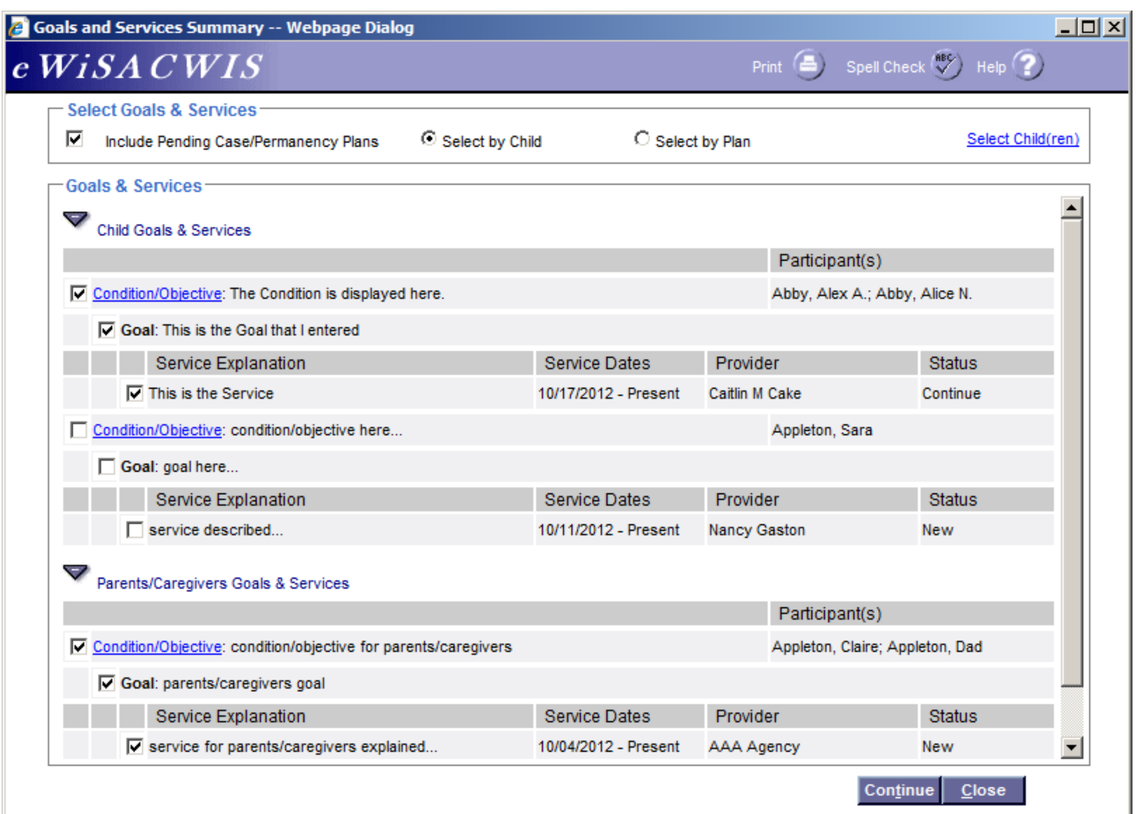


By default, all children in the case will be selected (the Select by Child radio button is selected). Click the Select Child(ren) hyperlink to bring up the Child Selection page to select a specific child's plan.

Select the Select by Plan radio button to bring up the Plan Selection pop up to select a specific plan.

48. The Goals & Services group box is used to select the Condition/Objective, Goals and Services that will be copied over. Check the box next to all that apply. Click Continue to return to the Case/Permanency Plan page, the selected Conditions/Objectives, Goals and Services will appear under the corresponding Goals & Services Section.

Note: Checking the box for a Service will automatically check the box for the associated Goal and Condition/Objective.

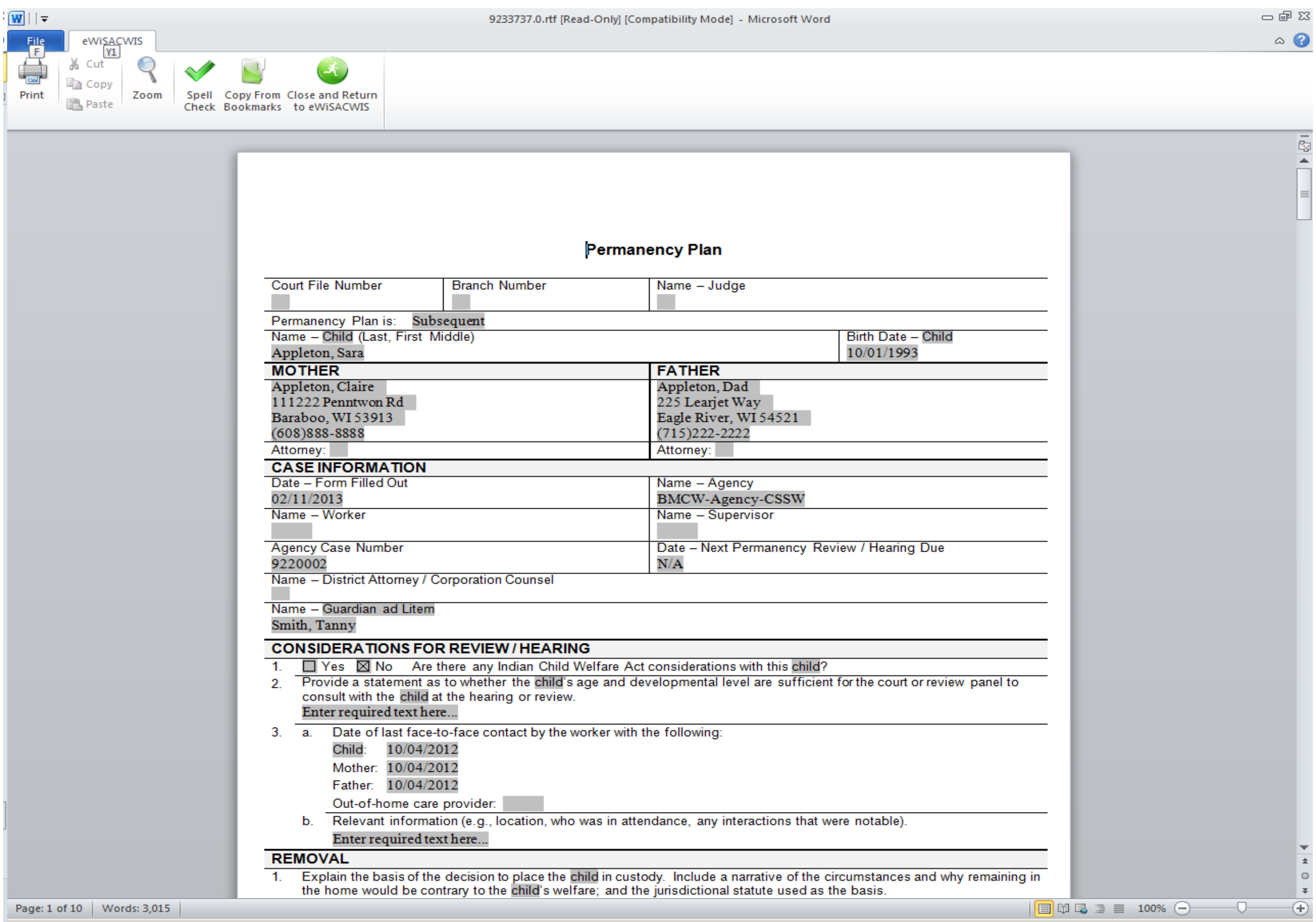


49. From the Options drop-down (on any of the tabs), you can approve the plan. Select Approval and click Go. On the Approval History page, select the Approve radio button and click Continue. On the Case/Permanency Plan page, click Save.

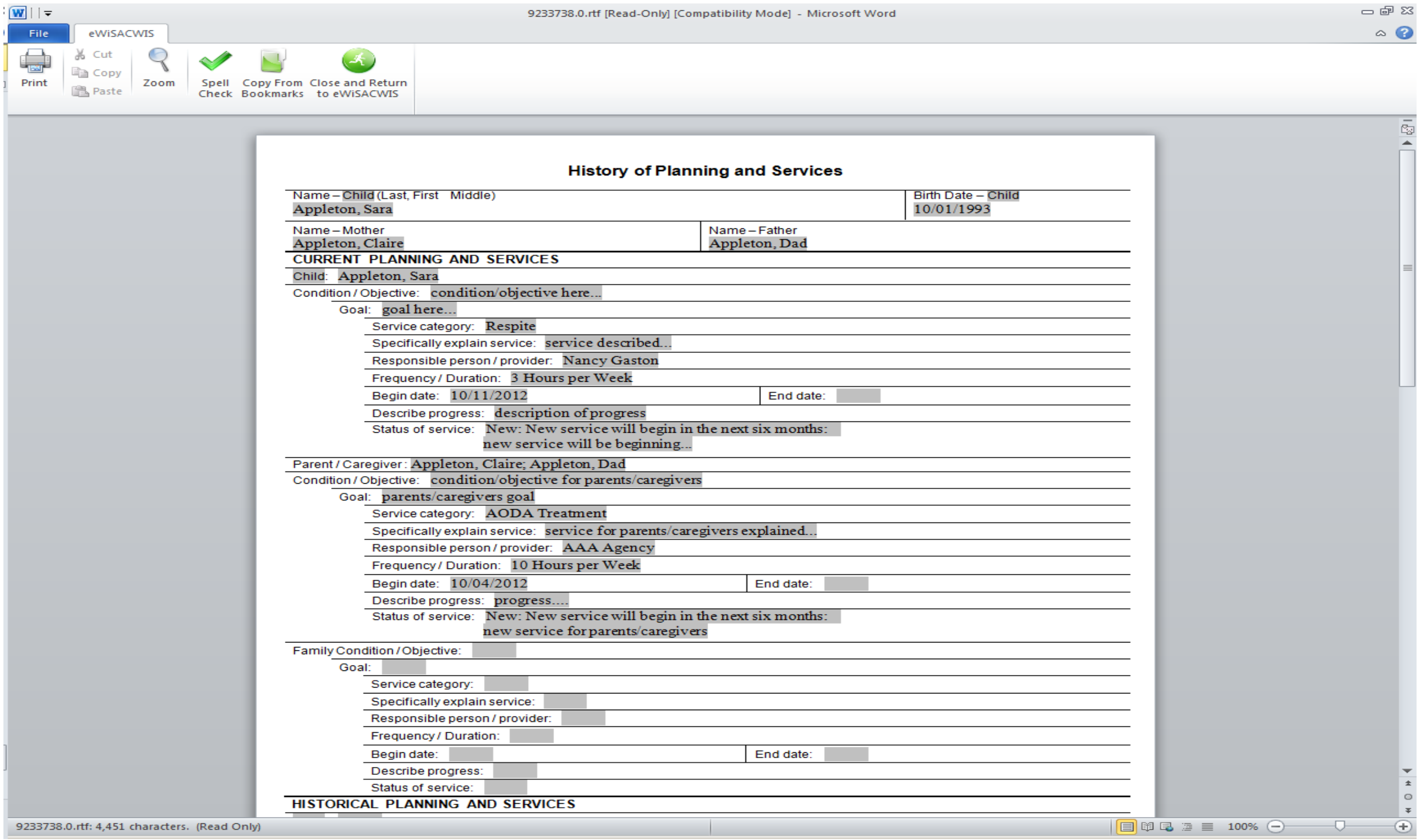
If a future Plan Date was documented, you can update the Plan Date to today's date.

50. You can launch the Permanency Plan template from any tab of the plan. Select Permanency Plan and click Go.

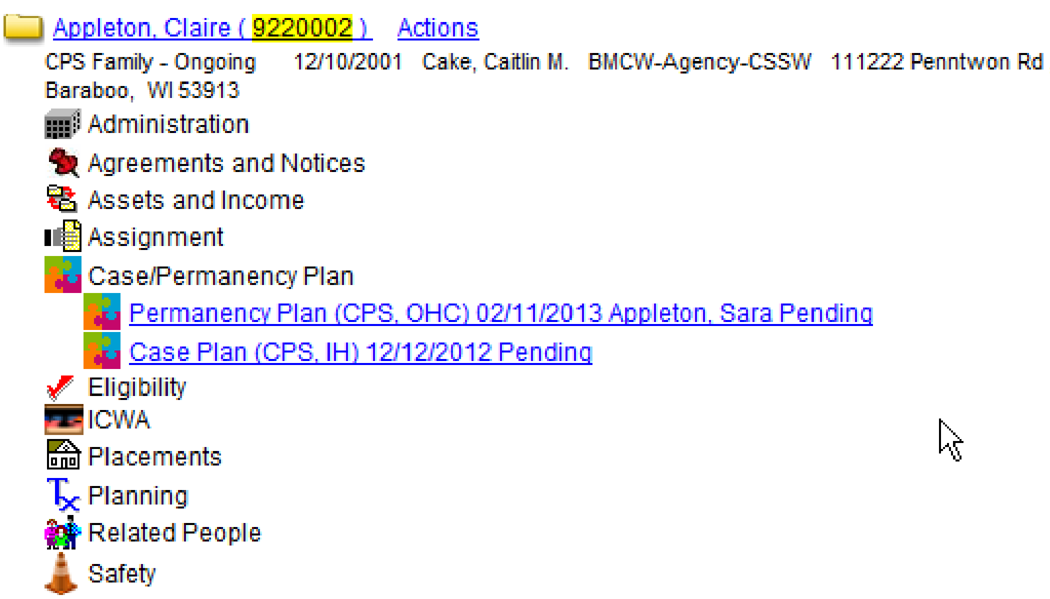
Note: The worker and supervisors names will not pre-fill to the template until after approval. The template should be printed after approval.



51. You can launch the History of Planning and Services template from any tab of the plan. This template contains the full history of Goals & Services that have been documented for the child(ren) on this plan (it does not print the selected period if the Display History check box is selected). Select History of Planning and Services and click Go.



52. The Permanency Plan will appear on the desktop under the Case/Permanency Plan icon. Click the Permanency Plan icon to see all of the related work associated to that Permanency Plan (a link to the associated review or hearing displays to the left)



53. An option to revise a Perm Plan is available if revisions were ordered at the Hearing/Review. The revise option will only be available if; the review is a judicial review or a panel review with one of the recommendations selected as 'Yes', and the review must be within 30 days of the plan date.

On a revised plan the Permanence Goals on the Permanency tab and the Goals and Services on the Planning & Services tab can be edited. Everything else copies over exactly from the plan that the revise option was launched from.

To revise a plan select 'Revise' from the options drop down on the plan to be revised.